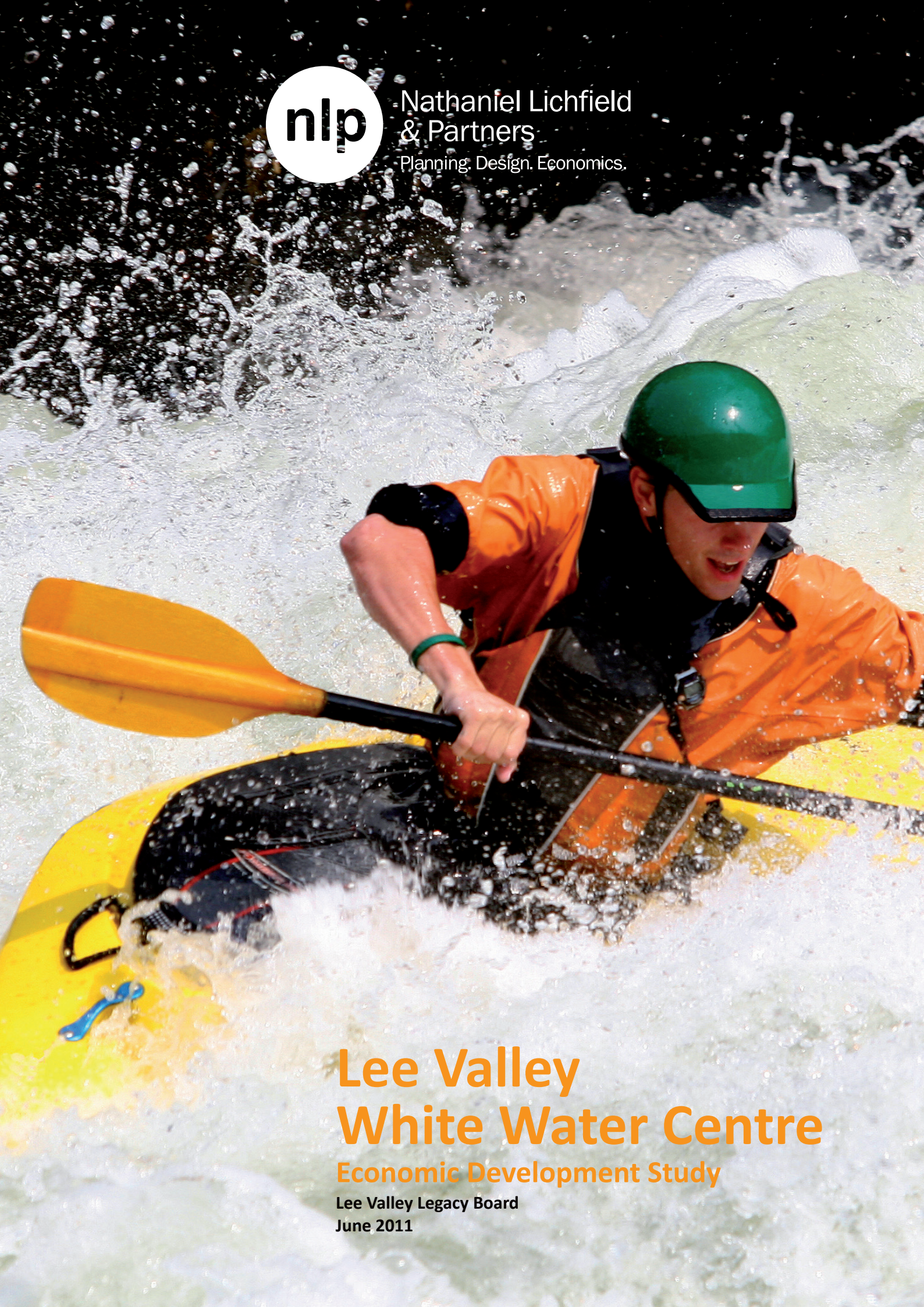




Nathanief Lichfield
& Partners

Planning. Design. Economics.



Lee Valley White Water Centre

Economic Development Study

Lee Valley Legacy Board
June 2011



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14 June 2011

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FINAL REPORT



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Executive Summary

This study assesses the potential of the Lee Valley White Water Centre (LVWWC) to strengthen the leisure offer of the Lee Valley Regional Park through complementary leisure, tourism or business developments on sites within the Park and the adjoining area, and to regenerate the area around the centre. It also identifies how the economic benefits of the LVWWC to the surrounding area can be maximised.

The LVWWC is a world class sporting facility developed for the London 2012 Olympic Games and the best of its type within the UK and one of the best in the world. It provides an important legacy facility to serve local and national sporting needs and has potential to form a catalyst for other development around it. Originally planned to attract 72,000 visitors annually, its early operation has attracted many more visitors than expected, suggesting its long term potential may be greater.

The Surrounding Area

The LVWWC site benefits from a location on the edge of the major population catchment of Greater London with 7.6 million residents, with very good road accessibility via the M25 motorway and the A10, and reasonable access by public transport. The surrounding area already contains significant outdoor recreational facilities, including the Lee Valley Country Park with 1.5 million visitors annually and Epping Forest with up to 4 million visitors. It is also important to note that there is no established centre within the Greater London area offering a wide range of outdoor sports/leisure activities.

There are also some established visitor attractions near the LVWWC site which can be built on, including the Norman Waltham Abbey and historic market town and the Royal Gunpowder Mills heritage and events centre, along with a reasonable range of hotel accommodation. While the two nearby town centres - Waltham Abbey and Waltham Cross - currently contain only a modest amount of retail provision and commercial leisure uses, there are some leisure development opportunities close to the LVWWC site.

Although the area around it has not attracted significant leisure development in the past, the LVWWC is a world class facility which can raise the area's profile while there are opportunities to build on established visitor attractions in the area and the services in nearby town centres.

Lessons from Established Centres

From a review of over 30 white water centres in the UK and overseas, only a few have developed into wider visitor destinations with a wide range of leisure/sports activities. Those that have done so focus on other outdoor and 'adrenaline' activities provided as a package to create a full day or weekend of activity for individuals, groups and corporate users, along with providing a venue for events.

This experience suggests that white water centres, and other comparable participatory sports attractions, do not by themselves tend to attract significant other leisure or visitor facilities around them, or develop organically into wider visitor destinations. Demand for sport/leisure activities often needs to be created by providing facilities. This indicates that a pro-active approach, strong marketing and other interventions will be needed if the LVWWC site is to develop into a wider leisure destination that can bring significant economic benefits.

To illustrate what is achievable, there are several examples of leisure parks, with a white water centre at their heart (e.g. Cergy near Paris and the US National White Water Centre in North Carolina) which have successfully developed into sizeable visitor destinations focused on outdoor recreation with between 400,000 and 1.5 million visitors annually, and supporting several hundred jobs. In these cases, activities, marketing and development are coordinated by a single central organisation.

Opportunities & Constraints

There are significant opportunities for further leisure development in the area around the LVWWC provided planning and environmental constraints can be overcome and market perceptions improved. The main opportunities arise from proximity to the major population catchment of Greater London, the increased profile of the area arising from the Olympic LVWWC facility and the availability of some development land and established visitor attractions close to the centre.

There are also some potential constraints on further leisure development on the LVWWC site arising from its Green Belt designation, from flood risk on parts of the site and low levels of parking provision. Adjoining land within the Lee Valley Park and the nearby Gunpowder Mills site also has significant constraints from environmental protection designations, flood risk, Scheduled Ancient Monuments and high electricity pylons.

This does not necessarily mean that desirable forms of leisure development will be restricted. It will be more a case of taking account of constraints and ensuring that appropriate forms of development are directed towards the most suitable sites for them, including sites nearby with fewer restrictions. The degree of development risk arising from planning and environmental factors would also need to be taken into account when identifying facilities that could be promoted to the market.

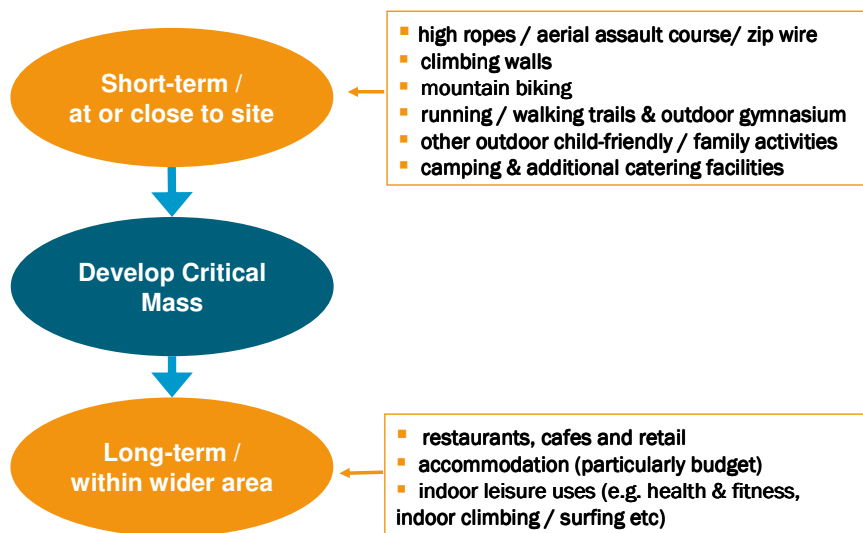
Market Potential

To attract new investment by operators/developers and enable certain other types of new facilities to emerge on the LVWWC site or nearby, visitor numbers to the area would need to be significantly increased by adding a bigger attraction, or a combination of other visitor attractions. The LVWWC can act as a catalyst for further development when combined with pro-active measures to bring other sports/leisure facilities to the site. Such additional attractions and

activities will have the greatest impact where they have some form of leisure activity connection to the LVWWC. Developments should therefore be active, adrenaline-type facilities rather than ones relating to passive enjoyment.

In this way, the collection of activities close to each other could be marketed under a theme. This new Lee Valley Park 'activity zone' could develop its own identity and become a destination in its own right, perhaps an adrenaline sports park for London. Whilst the activities and developments should mainly be 'active' facilities, they can also be developed to appeal to a range of age groups and levels of excitement. What is important is that collectively the developments possess a uniqueness that makes the site desirable across the catchment area and that the individual parts fit together as a coherent set of facilities that, from the consumers' perspective, appear to be part of a single offer.

If a number of additional attractions or facilities are combined with the LVWWC and actively promoted to the large population catchment, then a critical mass of facilities emerges which could attract a larger number of visitors, who in turn will demand other ancillary services such as cafes and restaurants, sports retail and hotels.



A range of potential sports/leisure activities and associated services were considered against various criteria to identify which ones are likely to be attracted to this location and had reasonable prospects of being viable and developed. This process took account of the potential population catchment, the existing competitive supply of leisure facilities in the area and consultations with operators of similar facilities where possible as well as how well each potential use/facility could:

- a fit with the Lee Valley Park brand (for uses within the Park)
- b complement the LVWWC offer
- c avoid harm to the current Lee Valley Park offer

- d form part of a marketable offer that has unique selling points
- e be able to be developed in phases
- f provide positive economic impact - will it attract visitors from outside the area
- g attract private sector investment
- h demonstrate some potential to be viable
- i be developed in close proximity to other aspects of the offer whilst remaining outside of the park boundary.

The table below identifies an indicative list of uses that could be attracted to the LVWWC site and nearby areas over these different timescales/development phases.

Short Term (could be developed immediately)	Medium-term (requires critical mass of visitors)	Long-term (when established leisure destination)
Archery	Indoor Surfing	Budget hotel
Zorbing/Hydro Zorbing	Go-karting / Indoor Karting	Sports retail
Zip-wire	Indoor Climbing Centre	Restaurants/bars
Aerial Ropes Course	Laser Quest	Other large indoor facility
Bungee Trampoline	Health & Fitness Club	
Golf Driving Range	Sailing / Watersports	
Bike Hire		
Outdoor Climbing Wall		
Golf Frisbee		
Laser Clay Pigeon Shooting		
Paintballing		
Children's Indoor Play area		
~173,000 visits	~254,000 visits	600,000 - 1,100,000 visits

It is important to emphasise that this initial assessment of potential uses which could work in this location should be explored in terms of viability/feasibility with a prospective operator/developer before moving forward on any specific activity. This will provide the most robust indication of its deliverability although this should not necessarily restrict the Park from bringing forward some facilities itself where viability is less uncertain.

Economic Impacts

The scale and type of leisure development, and numbers of visitors, that can be attracted to the area around the LVWWC over the next 5 years or so appears unlikely to be greatly constrained by future economic conditions and weaker consumer spending growth. Only a few larger facilities that require greater capital investment, and where operators will be more sensitive to visitor numbers, would be less likely to come forward under weaker economic and development market conditions. What will be more important will be whether

the area can widen its range of leisure facilities around the LVWWC so as to build up sufficient visitor numbers that can attract some larger scale uses.

If all the identified facilities were developed, cumulatively in the order of 600,000 visits p.a. could be attracted to them, and potentially over 1 million p.a. if a large visitor attractor / major indoor sporting facility could be brought to the area. This number could be increased if events were held although this may conflict with other activities. However, some of these visitors would be using several different sporting facilities on their visit and some facilities (e.g. hotel, restaurants) would be simply feeding off the visitors to the sporting activities but not attracting them in their own right. The actual number of visitors to the area could therefore be perhaps only half to two thirds of 600,000 p.a.

In terms of the level of job generation associated with new leisure facilities attracted by the catalytic effect of the LVWWC, it should be possible to support up to 330 direct jobs in the area, including the LVWWC itself, and potentially up to about 400 in total if some large scale leisure uses can be attracted. Including indirect or spin-off jobs, the total impact on local employment could be as much as 430 jobs in the longer term. The Table below illustrates potential levels of job growth over time under different economic conditions.

Employment growth by growth scenario (Cumulative)

Scenario	0 – 5 years (No. of Jobs)	6 - 10 years (No. of Jobs)	10+ years (No. of Jobs)
Low Spending Growth/ Development Finance	130	220	220
Moderate Spending Growth/Development Finance	130	220	330
High Spending Growth/Development Finance	130	220	380

These new jobs would contain a reasonably wide range of opportunities at different skill levels, with a significant proportion of both higher level managerial posts and lower skilled jobs. This range of jobs should provide opportunities for many of the unemployed residents in the area.

A significant proportion of these new jobs are likely to be seasonal in nature and part-time. This reflects the nature of the leisure sector generally. To increase the job benefits, a focus on attracting more indoor sporting facilities will be important.

Other economic effects will include increased visitor spending in the local area, potentially some effects on the local supply chain and some local economic impacts from on-going construction activity and maintenance of facilities, such as construction jobs and spending with local suppliers.

Job Skills/ Training

In terms of maximising access to the new jobs by local residents, desirable measures would include:

- a the Park Authority inviting all leisure operators and its delivery and service partners to advertise their jobs on the Authority's own website, and ensuring jobs are advertised to the local community;
- b the Park Authority providing a link on its website to careers advice;
- c planning permissions/ S106 agreements for new leisure uses requiring a specified proportion of local recruitment, or funding for a job brokerage scheme administered by the Park Authority;
- d ensuring that new leisure facilities tap into Park Authority processes for accommodating volunteers and work experience placements;
- e the Park Authority making places on its internal courses available to leisure facility providers at a discounted rate;
- f establishing links with established training providers such as Hertford Regional College to ensure suitable courses are available and workers in the leisure cluster facilities can be placed on them;
- g the Park Authority funding apprenticeships for leisure facility managers.

Physical Infrastructure Requirements

Consideration was given to any improvements to local infrastructure required to support new leisure development around the LVWWC, including both physical infrastructure and social-infrastructure (e.g. employment training etc).

In terms of additional physical infrastructure, the main requirements would include:

- improvements to footpaths between the LVWWC site and nearby town centres and rail stations;
- provision of additional car parking or better use of existing parking provision in the area to accommodate increased visitor numbers;
- measures to improve public transport access by visitors including a combined all-day ticket to the LVWWC site with discounted local bus/train or park and ride fares;
- preparing a Travel Plan for the LVWWC site/leisure uses cluster to maximise non-car journeys and hence minimise future parking and highway infrastructure requirements.

Planning/Tourism Strategies

Current planning and tourism policies for the area are broadly supportive but not adequate to actively promote the type and scale of development envisaged. There also appears to be no detailed strategy to deliver these aims or market

the area as a visitor destination. The following types of approaches could be considered within local development plan documents:

- a designating the LVWWC site and the land around it as an area to be covered by an Area Action Plan within the Local Development Framework process;
- b designating the LVWWC site and appropriate adjoining land as an area to which a Local Development Order could apply, with a relaxation of planning restrictions for certain types of leisure development;
- c consider whether the Green Belt boundaries should be amended in this location, or the site designated as a Major Developed Site in the Green Belt, in order to facilitate future leisure development;
- d including policies in local development plans which support leisure development in this location, subject to appropriate criteria.

In terms of tourism strategies, a policy would be helpful which provided general encouragement for leisure/sport-related development in this location where it would enhance the LVWWC, fit with the brand for the area and help it develop as a wider visitor destination.

Spatial Framework

Key elements of a Spatial Framework for the area around the LVWWC are set out to provide guidance on the spatial distribution of facilities, and how these facilities could be linked and accessed to help create a wider visitor destination. The Framework comprises a series of plans and supporting tables which can inform future local development plans or Area Action Plans, used to market the area or support funding bids.

The Spatial Framework focuses on the local area around the LVWWC and Waltham Abbey/Waltham Cross, but also identifies strategic linkages to facilities within the wider area, for example to Epping Forest. Clusters of activities are labelled as Activity Zones, the character and constraints of which are used to formulate a preferred spatial distribution of potential future activities. In order to put the LVWWC in context and capture the complex potential associations between activities, the Framework also identifies a broad range of potential facilities (i.e. beyond just adrenaline sports or activities which offer high job creation/economic potential).

The Spatial Framework also provides commentary on Opportunities Sites for new investment, analysing how these locations are currently connected into the movement network and where improvements to connectivity could add to potential economic and social benefits. It also provides broad strategies and interventions for preferred physical and non-physical connections within the study area which will support the Linkage Concepts and Opportunity Sites.

Marketing/ Branding

To develop the LVWWC site and its immediate surroundings into an attractive location for investment initially, and ultimately a major visitor destination for adrenaline-type activities, it will be essential to prepare:

- a brand strategy which sets out how the site and other related activities will relate to the market and also identifies how the site will fit within the overall brand of the Park;
- a marketing strategy which identifies specific target markets, communication channels and the roles and responsibilities of the Park Authority and its partners.

The Lee Valley Park Authority is currently developing a new brand for the park as a whole while the LVWWC has its own individual brand - "Go Whitewater". However, given the range of other major destinations within the park, this brand would be less effective at advertising the much wider variety of facilities and events which are likely to be developed around the centre.

Over the medium term as new activities are developed, the existing brands should be extended or adjusted to provide a clear message for the area around the LVWWC. By then, the "Go Whitewater" brand could be too focused on water activities specific, while the Lee Valley brand may not be specific enough. However, any new or extended brand will clearly have to be closely related to both the existing brands.

Once the brand strategy has been developed, specific marketing objectives should be set to:

- a position the site as an exciting and invigorating indoor and outdoor experience;
- b create a visitor experience which has strong local market appeal and is also recognised nationally and (in specialist markets) internationally;
- c ensure that visitors' needs and expectations lie at the heart of the new experience;
- d increase visitor numbers to this part of the Park, increasing dwell time and generating spend;
- e develop commercial revenue and private income to support the ongoing marketing, interpretation and development of the site.

Interventions

To develop the wider visitor destination envisaged for the site, specific actions and leadership on development may be required to deliver additional facilities. For some of the uses identified, minimum intervention may be needed, such as:

- a the Park Authority developing some facilities itself, particularly those requiring more limited levels of investment;

- b promoting potential opportunities to developers/operators in the form of an investment prospectus, or some form of masterplan identifying what types of facilities might be developed along with market information (e.g. population catchment and park visitor numbers);
- c for facilities requiring greater levels of investment and/or specialist operator expertise, consider bringing in a private sector development partner.

For those uses that the market may not be willing to take the risk of development in an untried location, at least in the short term, probably types of facilities requiring significant capital investment and larger numbers of visitors, other forms of intervention could be considered:

- the Park Authority (and/or local authorities) could provide a site with outline planning permission and install essential services/infrastructure to make the development more attractive to the market and reduce risk;
- public sector funding could be sought to install infrastructure to the site and potentially fund some of the new facilities;
- the Park Authority or other landowner could reduce the developer's risk by agreeing to a share of profits rather than charging for the land costs or rent;
- the Park Authority (and/or local authorities) could provide initial subsidies to the operation of some desirable activities within the Park.

Delivery Actions

The report also sets out a broad series of actions over time for developing new facilities around the LVWWC site - in the short term before the 2012 Olympics, the medium term up 2015, and the longer term - and initiating necessary interventions to help bring development forward. For the short term, these would include:

- 1 initiate work on formulating an area masterplan and/or Area Action Plan
- 2 produce an investment prospectus for promoting sites to prospective operators/developers
- 3 explore private sector partner opportunities
- 4 develop a marketing and branding strategy
- 5 identify small-scale leisure activities which could be implemented by the LVRP.

In addition, measures that could be used to help maximise local visitor spending would include:

- a ensuring that branding/marketing exercises include local businesses in order to make visitors aware of other attractions and facilities;
- b ensuring that visitor 'bundles' are offered on the LVWWC site and other facilities to incentivise and advertise other local attractions/activities;

- c improving pedestrian links and signage between the centre and Waltham Abbey town centre in order to encourage visitors to visit the town; and
- d setting up a local forum to identify initiatives to maximise local economic benefits from the LVWWC and develop its role as a visitor destination, including representatives of local authorities, local businesses and the Park/LVWWC management.

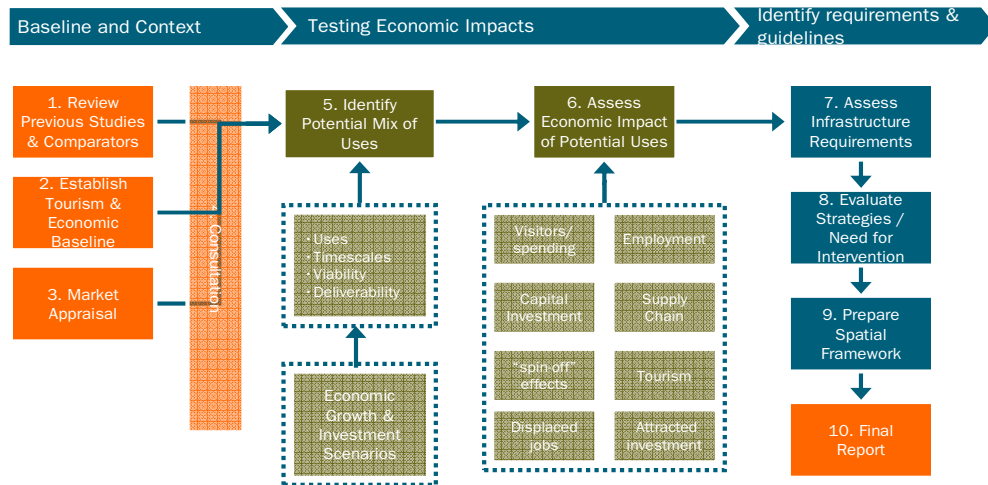
1.0 Introduction

- 1.1 The Lee Valley White Water Centre (LVWWC) lies within the Lee Valley Regional Park on the northern edge of London. It also lies on the boundary between Broxbourne borough and Epping Forest district, and between the counties of Essex and Hertfordshire.
- 1.2 The Centre has been developed as a world class sporting facility for the London 2012 Olympic Games. Following the Games, it will provide an important legacy facility to serve local and national sporting needs and with potential to form a catalyst for social and economic regeneration around it.
- 1.3 This study has been jointly commissioned by the Lee Valley Legacy Board, comprising the Lee Valley Regional Park Authority, Essex and Hertfordshire County Councils, the Borough of Broxbourne, the London Borough of Enfield and Epping Forest District Council. The purpose of the study is to assess the potential of the LVWWC to strengthen the leisure offer of the Lee Valley Regional Park through complementary leisure, tourism or business developments on sites within the Park or the adjoining area and to regenerate the area around the centre. It is also to identify how the economic benefits of the LVWWC to the surrounding area can be maximised.
- 1.4 Specific objectives and outputs required from the study were to:
- 1 provide a baseline overview of the existing social and economic character of the area surrounding the LVWWC;
 - 2 quantify the potential economic and social impact of the LVWWC on the Regional Park, Broxbourne borough and Epping Forest district over the next 5 years for three different scenarios of growth;
 - 3 undertake a market appraisal that assesses the scale and type of opportunities for complementary new development in the surrounding area;
 - 4 provide a spatial framework for the surrounding area to identify new opportunities and guide new development;
 - 5 identify non-physical interventions that would maximise local economic and social benefits of new development;
 - 6 advise on the appropriateness of existing economic development and tourism strategies and what the emphasis of new strategies should be to maximise the benefits and opportunities of the LVWWC;
 - 7 provide a timeline for delivery of new investment;
 - 8 identify requirements to develop local employment skills to support and enable access to new job opportunities in the area;
 - 9 identify any improvements required to local infrastructure to support new development associated with the LVWWC, and any barriers to these.

Approach and Methodology

1.5 The overall process and key steps involved in this study are illustrated by Figure 1.1 below.

Figure 1.1 Study Methodology



1.6 A key input to this process was consultation with various organisations with an interest in leisure, tourism and business development in the area including economic development, tourism and inward investment agencies, business groups, leisure operators and some local firms. Appendix 1 contains a list of consultees.

1.7 In addition, a review was undertaken of comparable sporting facilities, particularly white water centres, in the UK and overseas, exploring what types of development has occurred beside them and what strategies have been adopted to maximise their economic benefits.

1.8 The study also draws on economic development and tourism strategies for the area, relevant planning policy documents and published economic statistics. These information sources are listed in the Reference Documents section of the Appendices.

Structure

1.9 The report is structured as follows:

<p>The Lee Valley White Water & Surrounding Area (Chapter 2)</p>	<p>Describes the location of the LVWWC, its facilities, accessibility and uses in the surrounding area.</p>
<p>Socio-Economic Context (Chapter 3)</p>	<p>An overview of current socio-economic conditions, recent trends and developments in the area around the LVWWC.</p>

Review of Comparable Facilities (Chapter 4)	Identifies development approaches at comparable sports facilities elsewhere and key lessons from these.
Market Appraisal (Chapter 5)	An audit of current and planned provision of leisure/tourism facilities in the study area and assessment of market demand for different uses.
Development Scenarios & Economic impacts (Chapter 6)	Identifies different scenarios for development linked to the LVWWC and the economic impacts of these in terms of jobs, investment and timescales.
Infrastructure Requirements (Section 7)	Identifies any improvements to physical or social infrastructure required to support growth options.
Spatial Framework (Chapter 8)	Illustrates the potential spatial distribution of new facilities and linkages to guide future development plans or form input to an investment prospectus.
Strategies & Interventions (Chapter 9)	Recommends appropriate strategies to support new investment around the LVWWC and maximise benefits, and identifies potential interventions required.
Overall Conclusions (Chapter 10)	Provides key findings and recommendations arising from the study.

2.0 The Lee Valley White Water Centre & the Surrounding Area

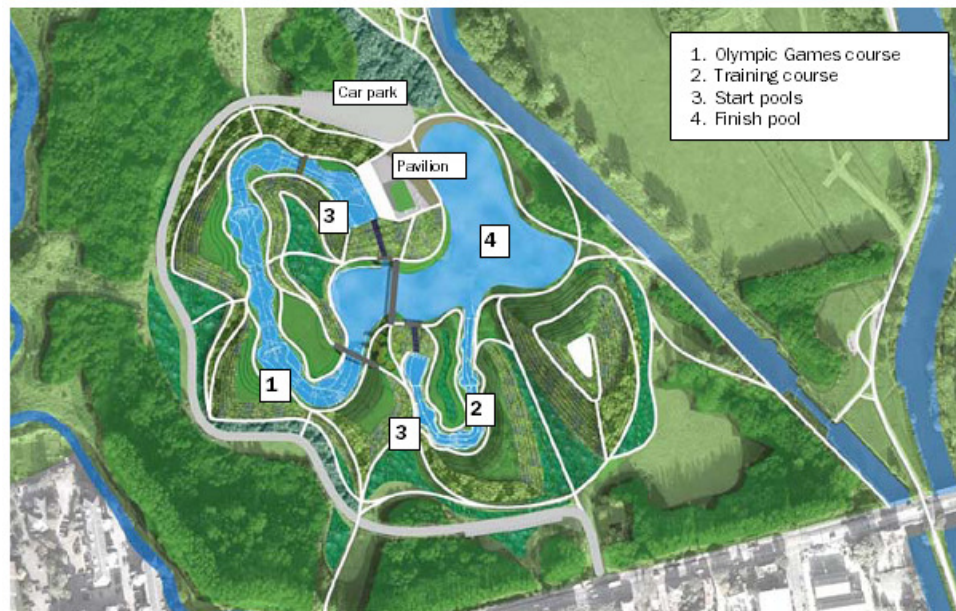
2.1 This section describes the main features of the Lee Valley White Water Centre, the activities and facilities it will contain and the nature and mix of uses in the area immediately around it. It also identifies the main existing leisure and tourism facilities within the area.

The White Water Centre

2.2 The Lee Valley White Water Centre (LVWWC) has been developed as the venue for the canoe slalom event in the London 2012 Olympics. The centre cost £33 million to build, funded by the Olympic Delivery Authority, the Lee Valley Regional Park Authority, the East of England Development Agency and Sport England.

2.3 The LVWWC has also been designed to form a legacy facility and a major centre for white water rafting, canoeing and kayaking. It will be able to be used for coaching, sports development and training for elite athletes preparing for competition, as well as a recreational facility available to the general public, with up to 72,000 visitors expected annually

Figure 2.1 The Lee Valley White Water Centre Site



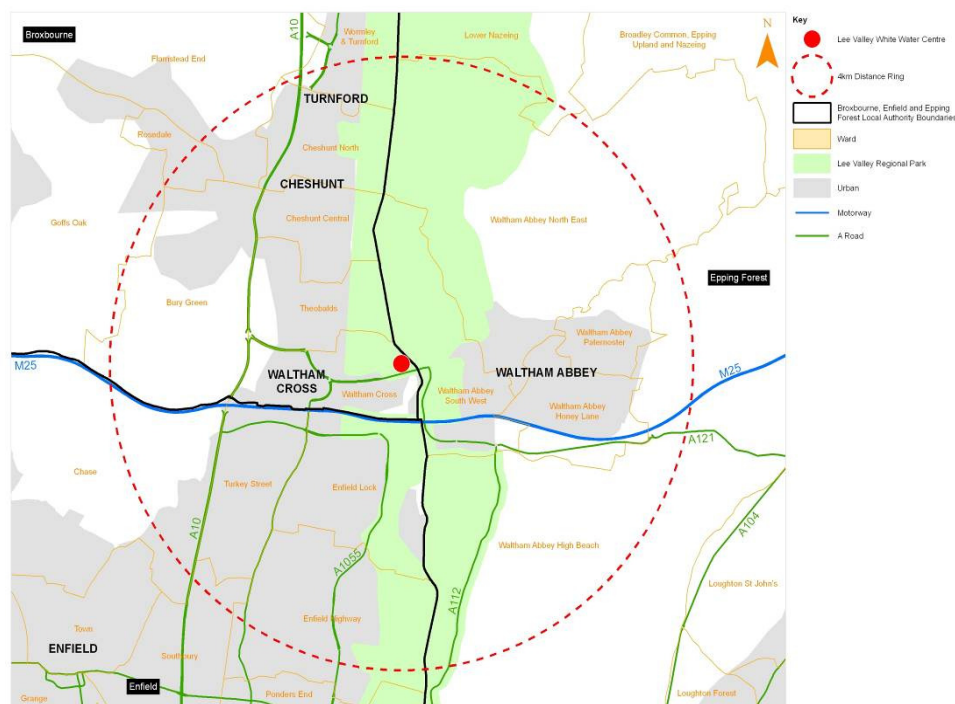
2.4 The facility lies within the Lee Valley Country Park on the border of the Hertfordshire district of Broxbourne and the Essex district of Epping Forest on the northern edge of Greater London. Access to the site is from Station Road on the edge of the small town of Waltham Abbey.

- 2.5 The LVWWC is scheduled to open for 6 months in April 2011 but will then close for the Olympics events and re-open as a public venue in late August 2012.
- 2.6 The LVWWC is understood to be the only venue of its kind to have two white water courses. The main facilities are:
- an Olympic standard competition course, with grade 4 rapids, a 300 metre long white water course, with a 5.5 metres descent from the start pool to the finish pool;
 - a 160 metres long white water training course, with grade 3 rapids and a 1.6 metre descent from the start pool to the finish pool;
 - the lake, filled from an aquifer, which will have a depth of 1.8 metres and can be used for canoeing, kayaking and rafting;
 - a public viewing area over the courses;
 - floodlighting to the courses to allow for evening rafting and canoeing.
- 2.7 The site of the LVWWC comprises some 20 ha. Other facilities existing or planned on this site include:
- a cafe/bar with a terrace overlooking the courses;
 - a state of the art meeting room with private terrace, full AV facilities, WIFI and views over the course;
 - free coach and car parking.
- 2.8 The centre is expected to have approximately 50 staff, which will include expert coaches, such as the captain of the men's senior GB rafting team and former British international kayakers.

The Surrounding Area

- 2.9 As defined by the study brief, the local area considered by this study comprises an inner zone broadly within a 4 km radius around the LVWWC (Figure 2.2).
- 2.10 This area contains much of the 400 ha Lee Valley Country Park and the settlements of Waltham Abbey and Waltham Cross.
- 2.11 The Country Park is a broadly linear area of predominantly open land following the north/south course of the River Lee between Waltham Abbey and Broxbourne. It lies entirely within the Green Belt and extensive parts of it are designated as sites of nature conservation importance (e.g. SSSIs, local nature reserves) or as areas liable to flood. It contains a range of outdoor recreational facilities in addition to the LVWWC, such as fishing, bird watching and cycling, whilst it also contains a nature interpretation facility, café and marina. The LVWWC site lies within the Country Park.

Figure 2.2 LVWVC and surrounding wards



Source: NLP

- 2.12 The historic market town of Waltham Abbey (population 10,000) lies some 0.5 km to the east of the LVWVC site. This is a historic and reasonably attractive market town, with some period buildings, the Norman Waltham Abbey and gardens, and a modest range of shops, restaurants and pubs.
- 2.13 Approximately 1 km to the west lies the centre of the larger town of Waltham Cross (population 20,000). This contains a large purpose built shopping centre, a moderately sized main town centre shopping area with some restaurants and cafes, a bus station serving a wide area and Waltham Cross rail station nearby. To the south of the town centre lies the Gateway office park and beyond that a large industrial estate.
- 2.14 Immediately east of the Lee Valley Park lies the 69 ha parkland area containing the Royal Gunpowder Mills historic buildings and visitor attraction. The whole site is a designated Ancient Monument.
- 2.15 To the north west of the LVWVC lies the mainly residential area of Cheshunt within Broxbourne district while residential suburbs of the London Borough of Enfield lie to the south west beyond the A10.
- 2.16 Opposite the LVWVC site to the south of Station Road lie the Highbridge Retail Park containing several large retail warehouses and a large MacDonalDs fast food restaurant. There is also a small marina and riverside café for narrow boats, and the large Lea Road Trading estate. This estate contains a mix of

manufacturing, distribution and office uses, including one firm selling boats and sailing equipment.

- 2.17 The area close to the LVWWC is fairly well served by road links, lying between junctions 25 and 26 of the M25 motorway around London, and 2.5 km from the A10 trunk road running between London and Cambridge. Access to the LVWWC site is from Station Road (A121) on the southern boundary of the site, which runs between Waltham Abbey and Waltham Cross. The A121 provides links to M25 junction 26 and various main roads into central London.
- 2.18 The LVWWC site is also reasonably accessible by public transport. Waltham Cross station lies within 0.7 km and is on the Liverpool Street to Cambridge line, with branches to Hertford and Stansted Airport, and services every 15 minutes. Cheshunt and Theobalds Grove stations (both 1.5 km from the site) are on the London Liverpool Street to Cheshunt line, with a frequency of approximately 30 minutes.
- 2.19 There is also fairly good access by bus. Three bus routes run along Eleanor Cross Road/Station Road between Cheshunt, Waltham Cross, Waltham Abbey and Epping or Loughton. Two routes run north from Waltham Cross to Hertford and Harlow. Five other bus routes link Waltham Cross with Enfield and various other parts of North London serve the site.

The Wider Study Area

- 2.20 A wider impact zone is also considered in broad terms and this is taken to be the remainder of the three local authority areas of Broxbourne, Epping Forest and Enfield.
- 2.21 The Enfield part of the study area (inner zone) is a largely built-up, residential suburb of London. It contains few leisure facilities or commercial areas.
- 2.22 The Broxbourne portion contains the settlement of Cheshunt, within 3 km of the LVWWC, and areas of Green Belt around it.
- 2.23 The Epping Forest part of the wider study area contains the large open space of Epping Forest and extensive areas of Green Belt but not the district's main towns of Epping and Loughton, which respectively lie some 10 km and 8 km from the LVWWC.
- 2.24 This wider area also contains the large Lee Valley Regional Park, of which the Lee Valley Country Park forms part and which extends some 42km from Ware in Hertfordshire, through Essex, to the River Thames at East India Dock Basin in London via the Olympic Park in Stratford.

Current Provision of Leisure & Tourism Facilities

- 2.25 Understanding the current and planned provision of facilities for leisure, recreation and tourism in the area surrounding the LVWWC is also important in helping determine what additional facilities could be developed in the future.

The locations of existing facilities within the inner study area are identified on Plan 2.1, along with some more significant facilities within the wider area.

- 2.26 In terms of hotel and other visitor accommodation, the inner study area contains three budget hotels (Premier Inn and Travelodge) as well as a youth hostel. There are also two 4* hotels - the Marriotts at Waltham Abbey and Cheshunt and the 3* De Vere hotel in extensive grounds at Theobalds Park. Total hotel room capacity in the area is estimated at 821, with a further 114 beds at the youth hostel, as shown in Table 3.1. There is also a caravan park/camping site within the Lee Valley Park at Sewardstone, and in the wider area at Edmonton. There appears to be a deficiency of smaller, bed & breakfast style accommodation, with none identified in the inner study area.

Table 2.1 Accommodation within 4 km of the LVWWC

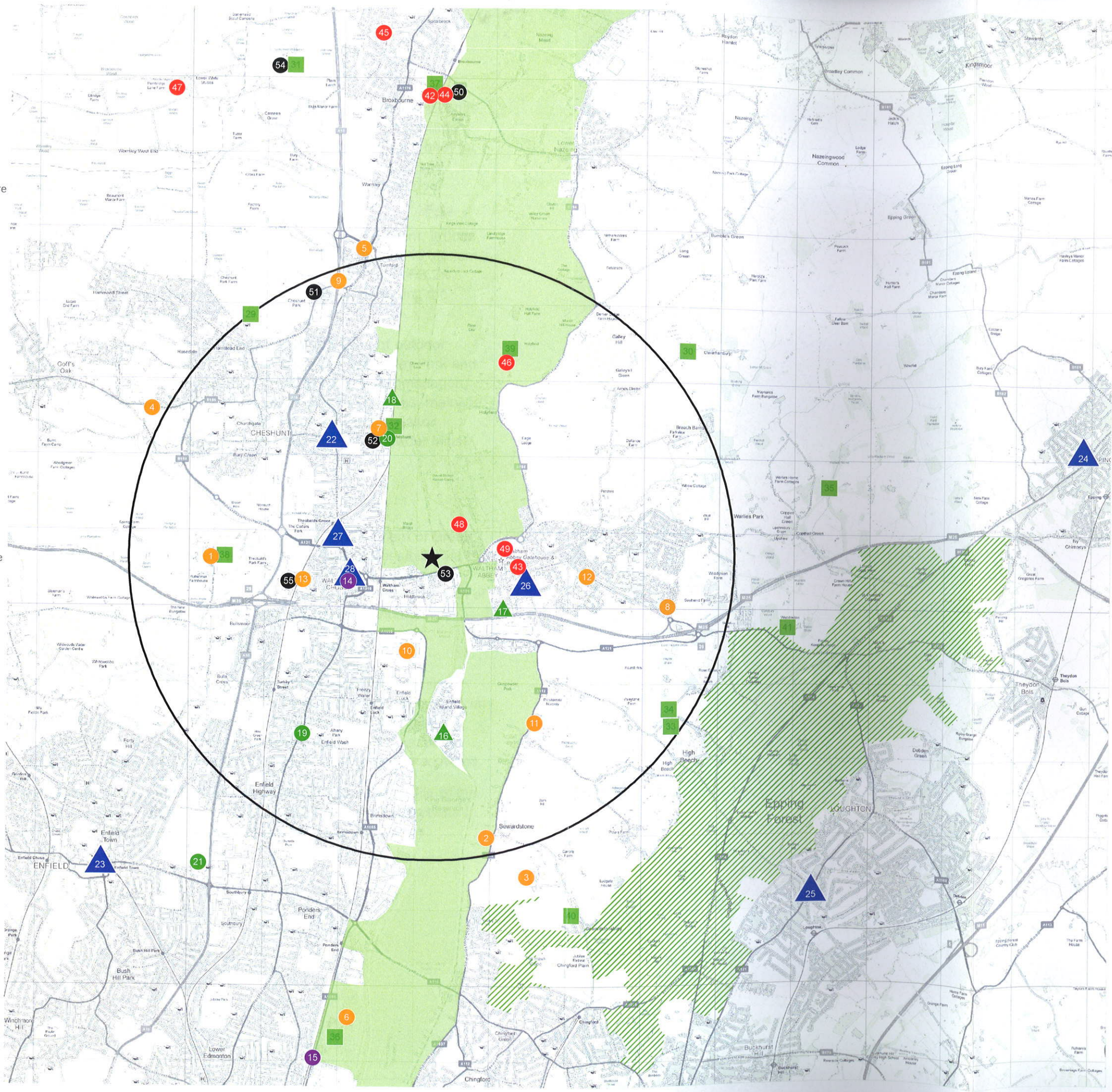
Category	No. of Rooms
¾*	442
Budget	379
Youth Hostel	33 (114 beds)
Total	854

Source: NLP Analysis

- 2.27 For conference activity, other than the modest facilities within the LVWWC itself, facilities are provided in the two Marriott hotels, the De Vere hotel and the Gilwell Park conference centre near Sewardstone, just outside the inner zone.
- 2.28 The main retail centres close to the LVWWC are Waltham Cross, which contains a variety of national multiple retailers as well as various cafes and pubs, and Waltham Abbey town centre, which has a range of mainly smaller independent shops and catering outlets.
- 2.29 Visitor attractions are focussed on the town of Waltham Abbey, with its historic market town character and 12th Century Norman Abbey (containing the burial place of King Harold), the Epping Forest Museum, and Royal Gunpowder Mills. Waltham Abbey attracts in excess of 10,000 visitors annually.
- 2.30 The Royal Gunpowder Mills comprises 20 buildings of historic importance forming an important industrial monument related to gunpowder production in England. It is set in 70 ha of natural parkland, with a small shop, café and regular exhibitions/events aimed at family day trips, but currently only open at weekends from May to September and for a few special events outside this period. It attracts 22,000 visitors annually.
- 2.31 There are also a number of attractions related to outdoor pursuits, many in connection with the Lee Valley Country Park, which attracts some 1.4 million visitors annually. Its facilities include several golf courses, two horse riding centres, boat hire, bicycle hire and a nature interpretation centre, although there is very little in close proximity to the LVWWC. The wider Lee Valley Regional Park has an annual 4.5 million visitors.

- 2.32 Further afield, the Paradise Park wildlife centre is the most significant facility, some 3km to the north west.
- 2.33 There are also a modest number of private health & fitness facilities within the inner zone as well as public sports/leisure centres in town centres. Otherwise, there are very few commercial leisure uses, mainly comprising a bingo hall at Waltham Cross and with no cinemas within the inner study area. Picketts Lock, about 7 km south of the LVWWC, contains a 12 screen multiplex cinema alongside retail and restaurant uses and an athletics centre. The Picketts Lock athletics centre is the largest indoor and outdoor athletics centre serving London and the South of England and a training ground used by top athletes for the 2012 Olympics.
- 2.34 Starting at approximately 4 km to the east of the LVWWC lies Epping Forest, the largest recreational open space area in London which comprises over 2,400 ha and stretches for 21km. It contains several listed buildings, visitor centres and Iron Age earthworks and holds a number of historic and environmental themed events throughout the year. This area reportedly attracts in the order of 4 million visitors annually.
- 2.35 Lastly, the London 2012 Olympics site, with the Olympic Park centre, Velodrome and Aquatics Centre, lies some 12 km to the south of the LVWWC partly within the Lee Valley Regional Park, and linked to it by the River Lee towpath.
- 2.36 In terms of other planned developments, there are several sites in the area where there are current proposals or planning permissions which could deliver further accommodation and leisure provision in the coming years. In the area close to the LVWWC, these include:
- a the Hazelmere Marina site, immediately south of the LVWWC site, which could include a new hotel;
 - b a planned 24 lane golf driving range beside Waltham Abbey, although planning permission was recently refused for this due to loss of protected woodland;
 - c the Park Plaza North site at the A10/M25 junction, which is identified as the site of a possible new hotel;
 - d Grundy Park Leisure Centre (renewed and expanded leisure facilities);
 - e expanded retail provision at the Brookfield Shopping Centre on the A10 north of the LVWWC.
- 2.37 The Lee Valley Park Authority is also in the process of developing some new recreational facilities within the Park, for example a Golf-Frisbee course.
- 2.38 The most significant development proposed further afield is the potential expansion of leisure facilities at Picketts Lock. This is the subject of a current study with no details available on the scale or type of uses being considered but this site is fairly distant from the LVWWC.

1. De Vere - Theobalds Park
2. Sewardstone Caravan/Camping Site
3. Gilwell Park Conference Centre
4. Goffs Oak Lodge
5. Katie's B&B
6. Edmonton Caravan/Camping Site
7. Lee Valley Youth Hostel
8. Marriot Waltham Abbey
9. Marriott Cheshunt
10. Premier Inn Enfield
11. Premier Inn Waltham Abbey
12. The Woodlands
13. Travelodge Cheshunt
14. Gala Leisure Ltd
15. Pickets Lock Cinema and Retail Centre
16. Island Fitness
17. Krunch Gym
18. Monster Gym
19. Albany Leisure Centre
20. Grundy Park Leisure Centre
21. Southbury Leisure Centre
22. Cheshunt Town Centre
23. Enfield Town
24. Epping Town Centre
25. Loughton Town Centre
26. Waltham Abbey Town Centre
27. Waltham Cross High Street
28. Waltham Cross Shopping Centre
29. Cheshunt Park Golf Centre
30. Claverhambury Carp Lakes
31. Hertfordshire Golf & Country Club
32. Herts Young Mariners Base
33. High Beech Golf Course
34. High Beech Riding School
35. Just Riding
36. Lee Valley Athletics Centre
37. Lee Valley Cycle Hire
38. Quad Safari
39. River Lee Country Park
40. West Essex Golf Club
41. Woodredon Equestrian Centre
42. Broxbourne Old Mill & Meadows
43. Epping Forest District Museum
44. Lee Valley Boat Centre
45. Lee Valley Nature Interpretation Centre
46. Lee Valley Park Farm
47. Paradise Wildlife Park
48. Royal Gunpowder Mills
49. Waltham Abbey Church & Gardens
50. Broxbourne Leisure Pool
51. Greater Brookfield
52. Grundy Park Leisure Centre
53. Hazlemere Marina
54. Hertfordshire Golf & Country Club
55. Park Plaza North



Key

- ★ Lee Valley White Water Centre
- 4km Distance Ring

Services & Facilities

- Accommodation & Conferencing
- Bingo & Cinemas
- ▲ Gym
- Leisure Centre
- ▲ Retail Centre
- Sport & Outdoor Pursuits
- Visitor Attractions
- Significant Future Developments
- Lee Valley Regional Park
- ▨ Epping Forest

nlp Nathaniel Lichfield and Partners

Project White Water Centre Study

Title Plan 2.1: Existing Leisure/Tourism Facilities

Client Lea Valley Regional Park

Date 23.06.2011

Scale 1 : 50,000 @ A3

Drawn by MAR

Dwg No GIS12545-001

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 GIS Reference: S:\CL12545 - White Water Centre Study\CL12545 - White Water Centre Study - Services & Facilities - 01.02.2011.mxd



- 2.39 Also outside the inner zone, there is a centre for boating activities, bicycle hire, cafe and a few cabins within the Lee Valley Park at Broxbourne. Broxbourne Council is working with the Park and others to work up a development brief for the site of the now demolished leisure pool site in this location, and land surrounding it. This could involve a mix of uses including a hotel, outdoor leisure and educational purposes.
- 2.40 In terms of the importance of the visitor sector to this area at present, it does not appear to be a major element. Broxbourne has 5.3% of its jobs in tourism-related sectors and Enfield 6.8%, both below the national average of 8.2%. Epping Forest has 9.3% of its jobs in such sectors, probably reflecting the presence of the Epping Forest within it.
- 2.41 Overall, therefore, the study area contains significant numbers of outdoor recreational facilities, partly reflecting the presence of the Lee Valley Park and Epping Forest, and a reasonable amount and range of hotel accommodation, but a modest amount of retail provision and commercial leisure uses, mainly within local and fairly small town centres. There are two sizeable visitor attractions close to the LVWWC (Waltham Abbey and Royal Gunpowder Mills) but few others within 5 km of the site.

Conclusions

- 2.42 The LVWWC site lies on the edge of the major population catchment of Greater London with almost 8 million residents, with very good road accessibility via the M25 and A10 and reasonable access by public transport. Its immediate surroundings within the Lee Valley Park contain some constraints in the form of Green Belt, environmentally protected areas and an Ancient Monument.
- 2.43 The area around the LVWWC contains significant numbers of outdoor recreational facilities in the Lee Valley Park and Epping Forest, and a reasonable amount of hotel accommodation as well as two sizeable visitor attractions close to the LVWWC. There is only a modest amount of commercial leisure uses, mainly within local and fairly small town centres. It is also important to note that there is no established centre within this area, or the Greater London area, offering a wide range of outdoor sports/leisure activities.
- 2.44 However, the LVWWC is a world class facility which can raise the profile of the area while there are opportunities to build on established visitor attractions in the area and the modest range of services in two town centres nearby.

3.0 Socio-economic Context

- 3.1 This chapter establishes the economic context for the study by reviewing recent social and economic conditions and trends within the local area around the LVWWC, in comparison with the regional and national situation. It also briefly reviews the planning and environmental policy factors that apply to this area. This is important in identifying the area's strengths and weaknesses, the types of investment and development that would be most appropriate and beneficial to it, and any factors that could constrain such development.

The Study Area

- 3.2 As defined in the previous section, the local area (or inner zone) considered by this study lies broadly within 4 km of the LVWWC. For statistical purposes, this area has been taken to comprise all the wards with the majority of their area within the 4 km radius - 3 wards in Enfield, 4 in Epping Forest and 5 in Broxbourne. This area is likely to contain most new development and be the recipient of most economic impacts associated with the LVWWC and therefore provides the main focus of this study. The wider impact area, which is also considered in broad terms, is defined as the three local authority areas of Broxbourne, Epping Forest and Enfield.

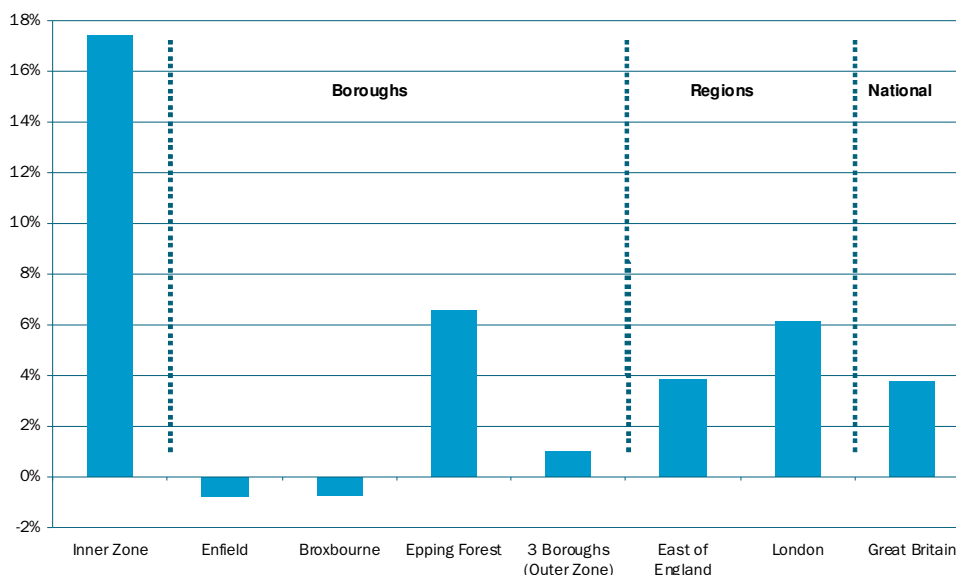
Economic Conditions

- 3.3 Because the local study area does not correspond to administrative boundaries, socio-economic data for the relevant local authority areas have mainly been used to provide a broad picture of economic conditions in the area in which the LVWWC lies, but with more detailed information given at ward and local super output area level where available and relevant.
- 3.4 The population living within the three local authorities (Broxbourne, Epping Forest and Enfield) was estimated to be 505,400 in 2009. However, within the inner area (4 km from the LVWWC), there were only 91,800 residents in 2001.
- 3.5 There are a number of significant employment areas containing a range of private sector employers located close to the LVWWC, primarily in industrial storage/distribution facilities. These include the Lea Road Trading Estate, which lies opposite the entrance to the LVWWC to the south of the A121 Station Road, the Britannia Road Employment Area some 0.5 km to the west, the News International printing/distribution facility at the M25/A10 junction, and large stand-alone distribution units for Sainsbury's and Findel Education to the south of the M25. In general, the area is a popular industrial/distribution location due to its excellent road accessibility via the M25 and A10. In contrast, the local office market is fairly weak although there is a modest amount of office development in Waltham Cross town centre.

3.6 Other than the recent News International development, this area has not attracted significant inward investment in the past, and has reportedly had relatively low movement of businesses in or out. This may be partly because of the extensive areas of Green Belt within it.¹

3.7 As shown in Figure 3.1 below, the inner study area saw significant employment growth of around 17% in the five year period up to 2008, a level much higher than the average for the wider area, which has seen negligible growth, and also better than the national average of around 4%. Indeed, employment levels in Broxbourne and Enfield fell in that period with only Epping Forest gaining jobs.

Figure 3.1 Change in Employee Jobs 2003-8

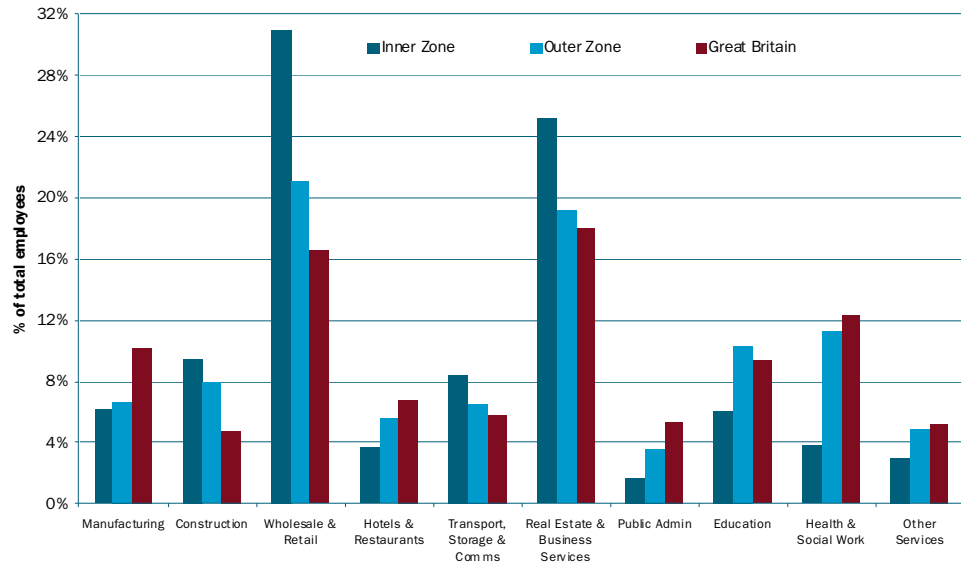


Source: Annual Business Inquiry and NLP Analysis

3.8 In terms of employee jobs, the largest sectors within the area in 2008 were wholesale/retail and business services, both of which accounted for a larger share of employment than the national average, particularly within the inner zone. As shown in Figure 3.2 below, the transport/storage/communications and construction sectors were also over-represented in this area. In contrast, manufacturing, public services, hotels/restaurants, education and health are all under-represented.

¹ Based on discussions with Invest in Essex

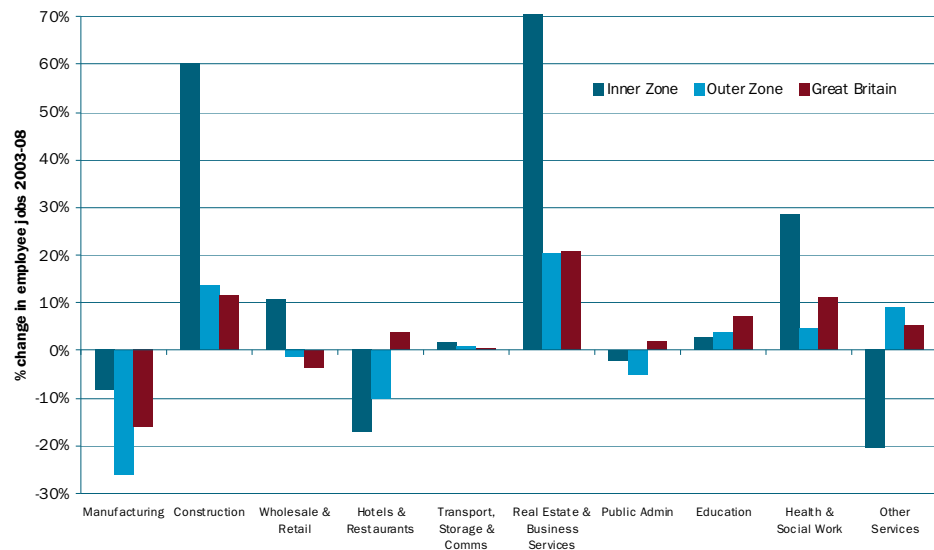
Figure 3.2 Proportion of Employee Jobs by Sector, 2008



Source: Annual Business Inquiry, NLP Analysis

3.9 The sectors which have shown most employment gains over the period 2003-8 have been construction and business services, both of which have grown by more than 50% in the inner zone in the last 5 years, much more than national rates (Figure 3.3). Wholesale/retail also grew against a national backdrop of contraction, albeit only relatively slowly compared with other sectors (+11%). Manufacturing, hotels/restaurants and other (mostly public) services all contracted in the inner study area over this period.

Figure 3.3 Change in Employee Jobs by Sector, 2003-8



Source: Annual Business Inquiry, NLP Analysis

3.10 Change in the number of active enterprises is also a good indication of the strength and vitality of the local economy. As shown below in Figure 3.4, Epping Forest and Broxbourne have much more businesses relative to their working age population than the regional and national average, although Enfield's stock is more in line with these averages. Recent growth (2004-08) in the number of enterprises has also been broadly in line with regional/national averages (around 10% over the period) although Broxbourne's growth has been much higher at around 16%.

Figure 3.4 Stock and change in the number of enterprises



Source: ONS Business Demography Statistics

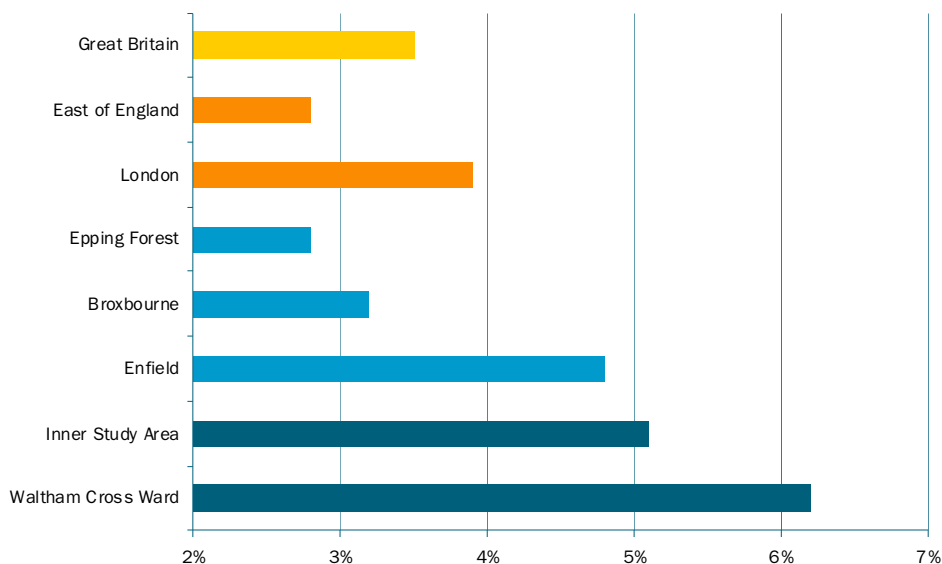
Labour Market Conditions

3.11 As shown in Figure 3.5 below, Epping Forest and Broxbourne within the wider study area have claimant unemployment levels below the national average, although Enfield's rate is higher. Within the inner zone, the unemployment rate is higher still, and Waltham Cross Ward has a rate more than double that in the East of England. Thus, the local area around the LVWWC generally has an above average concentration of worklessness, while the wider area has broadly average levels.

3.12 The ratio of claimant unemployed to unfilled Jobcentre vacancies can also be an indicator of how easy it is for local residents to find work, and of the tightness of the local labour market. This ratio was highest in the London Borough of Enfield (6.5) in November 2010, well above the national average (4.2) and highlighting the difficulties of finding work in this area. In contrast, Broxbourne (4.3) and Epping Forest (4.0) lie close to the national rate. These ratios are relatively low compared with London (7.7) but slightly above those in

the East of England region (3.5) and suggest that residents in the part of the study area outside London have reasonable prospects of finding work.

Figure 3.5 Claimant Unemployment as a proportion of the working-age population



Source: ONS

3.13 Economic activity rates vary considerably across the study area, as shown in Table 3.1 below, being significantly above the national average in Broxbourne, close to average in Epping Forest and well below average in Enfield. Overall, the wider study area has an activity rate slightly below national and regional averages. Recent data on economic activity is not available at ward level for the inner zone.

Table 3.1 Economic Activity Rates

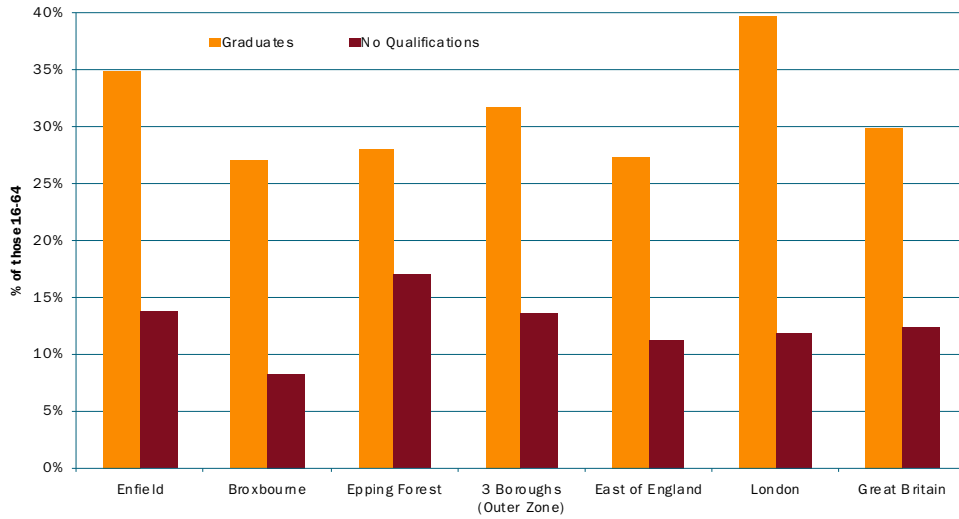
Area	% of 16-64 year olds who are economically active
Broxbourne	81.7%
Enfield	70.1%
Epping Forest	75.2%
3 Boroughs (Outer Zone)	73.4%
London	74.8%
East of England	78.8%
Great Britain	76.4%

Source: Annual Population Survey, Jul 2009 - June 2010

3.14 As shown in Figure 3.6 below, the wider study area has a skill profile relatively similar to the national average in some respects, with numbers of graduates lower than the London average but above that for the East of England. However, the proportion of those without any qualifications is above both regional averages. Within the study area, Epping Forest has the highest

proportion of residents with no qualifications, with significantly lower levels in Broxbourne and Epping Forest.

Figure 3.6 Skill levels of the working-age population

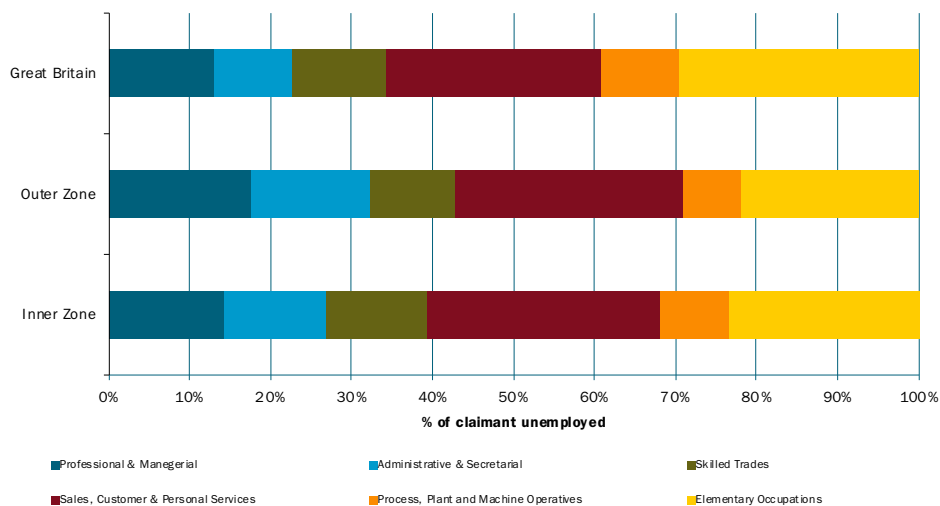


Source: Annual Population Survey

3.15

The sought occupation of the unemployed can give an indication of the types of jobs needed in the local area in order to reduce unemployment. As shown in Figure 3.7, only a small proportion of unemployed residents in the study area are seeking managerial or professional work. Around a third of claimants in the wider study area are seeking relatively unskilled work in elementary occupations or as machine operatives, whilst a further 21% want sales/customer service jobs. These proportions are lower than the national average.

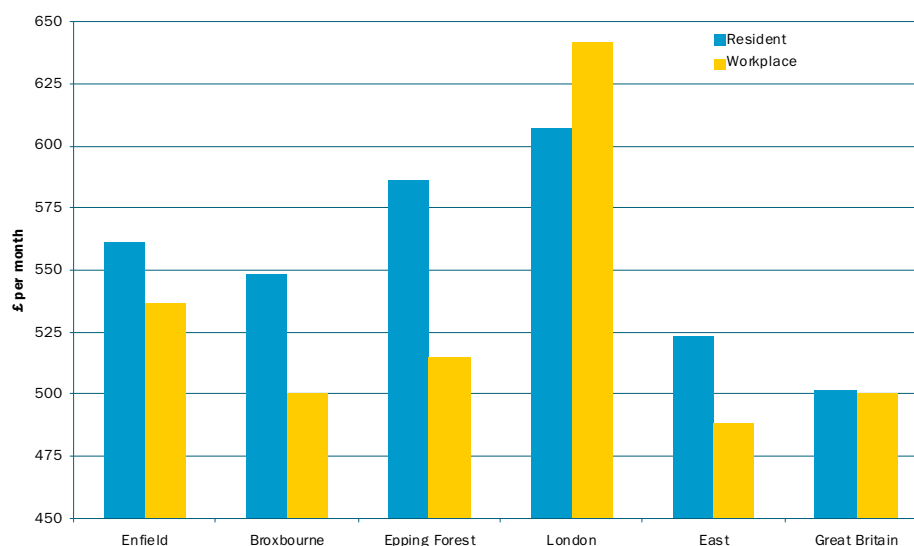
Figure 3.7 Sought Occupation of the Claimant Unemployed



Source: ONS Claimant Count

- 3.16 This picture of slightly higher than average proportions of people in the study area seeking professional work is also shown in the occupation profile of those currently in work. The proportion for this in the three boroughs (50%) is significantly above the same figure for the East of England and England as a whole (45%), albeit slightly below the proportion in London (54%). However, this was primarily due to a very high proportion in Epping Forest (61%).
- 3.17 As shown in Figure 3.8 below, wages in the wider study area are generally below the London average, but above the averages for the East of England and Great Britain. In general, wages of local residents were higher than those who worked in the study area, implying that many residents are commuting to better paid employment, often in London. Wage data is not available for the inner zone.

Figure 3.8 Median Weekly Gross Wages for Full-time Workers

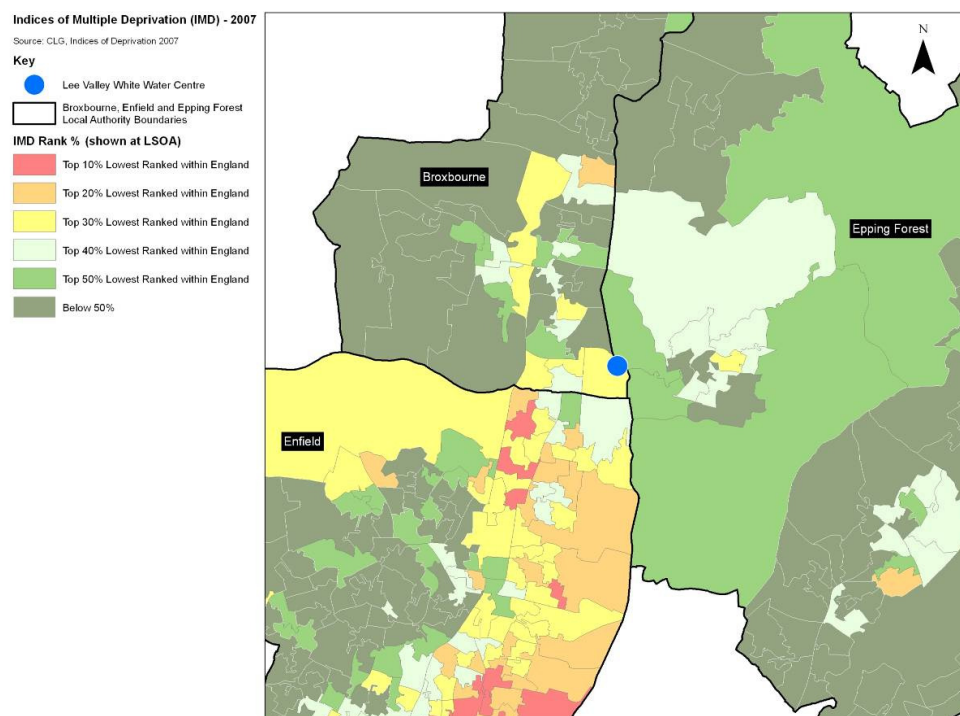


Source: Annual Survey of Hours and Earnings, NLP Analysis

Deprivation

- 3.18 The area immediately around the LVWWC has some concentrations of deprivation, as shown in Figure 3.9. In particular, parts of Waltham Cross, Waltham Abbey and Wormley are within the most deprived 30% of neighbourhoods in England & Wales. However, the most deprived areas close to the LVWWC lie within Enfield, with several areas around Turkey Street within the most deprived 10% of neighbourhoods nationally. This contrasts sharply with much of the wider area, particularly in Epping Forest and Broxbourne, which have much low concentrations of deprivation and are generally among the least deprived 50% of neighbourhoods in the country.

Figure 3.9 Deprivation in the area surrounding the LVWWC

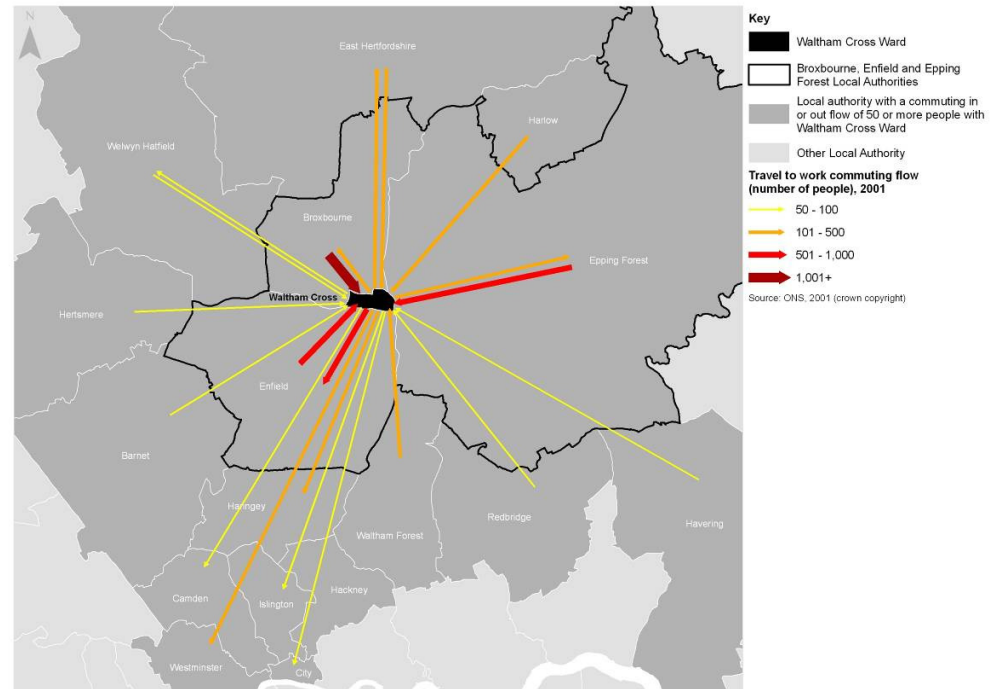


Source: ONS Neighbourhood Statistics IMD 2007/NLP Analysis

Commuting

- 3.19 Based on 2001 Census data, the wider study area is a net exporter of labour, as would be expected of an area on the fringe of London, with a net out-flow of 61,400 or 28% of residents. Of the area's 222,000 working residents, 51% commuted to work outside it, with large flows to Westminster, Haringey and the City of London, each accounting for 5-6% of the total workforce. Some 67% of the jobs in the area are filled by local residents, and sources of in-commuters are more dispersed, although there are significant flows from East Hertfordshire, Barnet, Haringey, Waltham Forest and Harlow, each with 3-4% of the total.
- 3.20 However, looking specifically at the ward within which the LVWWC lies, Waltham Cross is a significant net *importer* of labour. Only 25% of the 3,100 resident workers also work there while around half of the jobs based in the ward are filled by residents of the three study area districts (Figure 3.10).

Figure 3.10 Ward Commuting Flows



Source: 2001 Census/NLP Analysis

Conclusions

- 3.21 The area immediately around the LVWWC is largely open land, with significant industrial areas to the south and several smaller residential areas and town centres nearby. It also contains extensive areas of Green Belt land.
- 3.22 The inner zone around the LVWWC is a significant business location, with a number of large distribution units and industrial areas, largely due to its excellent road accessibility. It has seen strong employment growth in recent years, with an excess of jobs over local resident workers and significant in-commuting. This has been achieved against a prevailing trend of very low growth in the wider area. The main sectors supporting the local economy are retail, wholesale and business services. This area has not attracted significant other inward investment in the past, particularly leisure development.
- 3.23 However, despite generally good skill levels, reasonable wages and high economic activity rates in the wider study area, the inner zone, especially Waltham Cross ward, have high unemployment rates. Several neighbourhoods within the inner study area also have high concentrations of deprivation, particularly in the Enfield part of the area. This indicates a need for more local jobs to diversify employment opportunities, including some suited to local skill levels, and there is a reasonable supply of local workers to fill new jobs.

4.0 Review of Other White Water Centres

- 4.1 This section of the report reviews experience at a number of other white water centres in the UK and overseas, several of which were developed specifically for an Olympic Games. The aim has been to understand what scale and type of complementary activities have been developed at these other facilities, what approaches have been adopted to maximise the visitor numbers and economic benefits of the facility and any lessons from these that are applicable to the LVWWC.
- 4.2 An initial review was undertaken of around 30 known artificial white water facilities around the world, in order to identify those that have seen significant further development around the original venue. This review showed that the majority of facilities operate as stand-alone venues for canoeing/rafting training, sometimes with relatively limited access for recreational use by the general public and have no other activities or associated leisure uses but sometimes very basic accommodation. Examples of such centres include the Krakow Whitewater course (Poland), Ivrea Whitewater Stadium (Italy), along with the Holme Pierrepont and Cardington Artificial Slalom Course (UK).
- 4.3 Amongst the reviewed facilities were a number developed specifically for an Olympic Games, including those for Barcelona, Sydney, Athens and Beijing. The post-games use of these facilities has varied considerably, with the Beijing course due to be turned into a swimming and recreation resort and the Athens course potentially being incorporated into an amusement park, although it is currently still being used by elite athletes, and not open to the general public. The Barcelona and Sydney courses have retained their courses as Olympic-standard competition facilities and are reviewed in more detail below.
- 4.4 Only a small number of the centres reviewed have developed significant additional leisure/recreation facilities nearby, and for these a more detailed examination was undertaken. The approach involved internet research combined with telephone discussions with the centre's management and/or local economic development bodies.

Tees Barrage International White Water Centre

- 4.5 This centre has been open since 1994 and is located on the outskirts of Stockton-On-Tees just off the A19 and A66. However, it has been limited to white water use for 3 hours each side of low tide, reducing the availability of the course and making operation and use difficult. An upgrade is currently underway in order to remove dependence on the tides, thereby allowing the course to be operational at all times. The quality of the course is also being upgraded to be more appropriate to elite canoeing, rafting and international competition. When complete, the centre will have:

a a café

- b a range of waterside log cabins available by the night, primarily aimed at Canoe clubs on training weekends;
 - c a specialist watersports retail outlet;
 - d refurbished changing rooms, canoe storage buildings and car parking;
 - e classrooms for seminars.
- 4.6 In addition to the log cabins, there are a Premier Inn and the Whitewater Caravan Club Park/campsite within 2 minutes walk of the course, thereby offering a range of types and quality of accommodation. Also in close proximity to the course is Teeside retail park, containing a supermarket, restaurants, an 18 screen cinema, bowling facility and other entertainment venues. However, this retail park pre-dated the white water centre and these other leisure uses were not attracted by it.
- 4.7 There are also plans to move the Castlegate Quay watersports centre so that it is co-located with the white water centre (it is currently around a mile away). This will allow a much broader range of activities to be catered for at the site including sailing, flat-water paddling, power boating and windsurfing, and will allow greater efficiencies. If this were to occur, the combined centre would employ around 13 people, comprising a mixture of full and part-time administrative, managerial and instructional staff.
- 4.8 Prior to upgrading, visitor numbers were approximately 10,400 annually of which some 2,300 came from outside the North East. About 35% of the non local visitors stayed overnight in the area. Estimates of annual visitor numbers for when the course reopens range between 1,850 and 37,950, with the centre expecting a mixture of corporate and leisure rafting users, canoe clubs and a significant number on training courses for the emergency services.² Elite canoeists are not expected to be a significant part of the customer base.

Penrith Whitewater Stadium, Sydney, Australia

- 4.9 This centre hosted the canoe/kayak slalom events at the 2000 Summer Olympics in Sydney and is the only artificial whitewater course in the Southern hemisphere. The centre was built as a joint venture between Penrith City Council, the International Canoe Federation and the Olympic Co-ordinating Committee. It is located some 55 km to the west of the city within a regional park and beside the City of Penrith with a population of around 11,000.
- 4.10 The facility includes a café and is a popular recreational area, offering large rubber raft rides, as well as individual kayaking/canoeing and beach volleyball. In 2006, this centre attracted around 40,000 visitors per year, of which around 90% were there for a rafting experience, and generated around £1.1 million in income.³ The centre is open 7 days a week and for 10 months of the year.

² Economic Assessment of Tees Barrage White Water Course, PAWA Consulting, 2007.

³ Broxbourne White Water Centre Feasibility Study, August 2006.

- 4.11 In addition to recreation activities, the centre is regularly used for local, national and international canoeing/slalom events and it served as the host venue for the 2005 ICF Canoe Slalom World Championships. It actively promotes itself for corporate activities. There are a café and accommodation for catered functions within the site.
- 4.12 In terms of other commercial or leisure facilities around it, this whitewater centre forms part of a regional park and open recreation area containing several lakes and the Sydney International Regatta Centre, another Sydney 2000 Olympics facility. Over 400 events/large festivals are held on the Regatta Centre site, which attract almost 500,000 mainly non-sporting visitors annually. There is a restaurant/function facility on the site along with a shop selling canoeing equipment, a mountain bike hire business and a skydiving operation but no accommodation.

Seu D'Urgell, Barcelona

- 4.13 This facility lies in the small town of Seu D'Urgell (population 10,000), in a rural area near Andorra some 120 km from Barcelona, and close to the Cadi Natural Park, Catalonia's biggest natural park.
- 4.14 It was developed for the 1992 Olympic Games and now has year-round use by elite canoeists and national squads including the 2006 World Championships. However, the centre is also open to the public and is widely used by local schools, clubs and the wider community for canoeing, rafting, body surfing and pleasure sailing (gondolas), particularly because of the low prices which attract large numbers of young people. In addition to the white water course, facilities include boat storage facilities, a small gym and catering provision. The centre is set at the centre of a public park which has facilities for picnicking, jogging, cycling and walking but no commercial or leisure facilities.
- 4.15 The centre is owned by the city council and it employs 10 permanent staff and 29 temporary staff. Typical visitor numbers have been around 35,000 for the white water course and 100,000 for the wider park.⁴ Around two-thirds of the course's income comes from the rafting operation, with the remaining third from canoeing/kayaking activities.

Dutch Water Dreams

- 4.16 This facility within the town of Zoetermeer in the Netherlands is a white water sports complex which includes three indoor surfing waves and an Olympic-standard rafting/canoeing course. Zoetermeer is a former new town which is close to The Hague and with a population of over 120,000. It also has an indoor ski centre, indoor Olympic ice skating track and has plans for the largest indoor diving centre in the world, although none of these are located on the same site as Dutch Water Dreams.

⁴ From 1997.

4.17 The centre was built in 2006 by a commercial group at a cost of 35 million Euros. It offers the facilities for a wide range of users including professional sportspeople, recreation & leisure users, and specific groups of professionals (rescue teams, offshore divers, marines, fire brigades, etc.). Leisure activities catered for include rafting, tubing, hydro-speed, kayak slalom, freestyle kayaking, hot-dogging (a type of two person rafting) and indoor surfing. The centre's promotional material indicates that 23 countries intend to use it for training while the Dutch Canoeing Association has established the national training centre there. Sports visitor numbers have averaged 120,000 annually over the last four years. Several large events have been held e.g. the Dutch Open Canoe Slalom and the World Rafting Championships, which attracted 5,000 - 8,000 more visitors. Permanent staff number 18 with 280 more in the summer, of which two thirds are trainees.

4.18 Also at the centre are around 425m² of specialist retail space selling goods related to white water sports, a bar/restaurant with a full catering service and function rooms which can accommodate up to 465 delegates. A wide range of corporate packages are offered for occasions such as away days, team building, recruitment events and product launches, as well as leisure packages for birthday or stag/hen parties, all of which can include a combination of activities, food & drink, accommodation and private delegate space. With the centre now open for four years, there are plans to develop or improve facilities to retain visitors for a full day stay. A 3/4* hotel is planned for the site but this has been delayed by difficulty in obtaining finance.

US National White Water Centre, North Carolina

4.19 The U.S. National Whitewater Centre (USNWC) occupies a 160 ha woodland site adjacent to the Catawba River and lies on the outskirts of Charlotte, North Carolina (a city of 750,000), approximately 18 km from its centre. It opened to the public in November 2006 and is home to the world's largest, man-made white water river. It also has access to the Catawba River which allows flat water paddling to take place. The centre functions as both an outdoor recreation and athletic training facility for rafting and kayaking, but also offers a range of other facilities and activities which were developed at the same time as the white water centre. These include;

- a 23 km of woodland trails for mountain biking, hiking, eco-caching and trail running;
- b a high ropes course;
- c a team development Centre;
- d an 340m zip-line overlooking the river;
- e a large outdoor climbing wall;
- f a restaurant and bar;
- g a conference centre with capacity for up to 200 people;
- h a stage for live entertainment and special events; and

i survival courses.

- 4.20 The centre is run by a private not-for-profit company which was set up by the county authorities. In total, the facility cost around \$38 million to build using public loans but visitor and corporate revenue was subsequently lower than anticipated with loans defaulted and a taxpayer-funded bail out. One of the reasons for this underperformance has been cited as its location, being out-of-town and close to natural white water rapids which compete for custom. However, it also opened just before the 2008/09 recession which limited anticipated corporate usage. It is understood that the centre is now covering its costs partly due to introducing an All-Sport day pass scheme.
- 4.21 The total number of visitors is around 400,000 annually. However, only around 100,000 of these purchase the 'All-sport' pass which gives all-day entry to all facilities on the site, with many of the remainder coming just to walk or ride the trails, or to visit the centre's restaurant. Mountain biking has always been popular in the area, but the number of riders has risen significantly since the centre's opening due to the on-site bike hire and shop, as well as the catering facilities.
- 4.22 The centre also hosts a number of events including international canoeing competitions and trail races, such as the 2008 Olympic Canoeing Trials, although there is only usually one event a year with over 100 competitors. Many of the smaller events are increasingly being incorporated into festivals with live music in order to increase attendances. There is no accommodation on the site, although the centre has arrangements with a number of local hotels to direct overnight visitors to.
- 4.23 This centre has no plans to increase its current range of facilities or attract new leisure-related development around it. This partly reflects it being a not-for-profit body without access to funding but also that there is already a reasonably wide range of facilities on the site. Any diversification will involve small scale improvements and additions to existing facilities rather than anything major.
- 4.24 The centre currently employs around 25 permanent staff, although up to 325 seasonal staff are taken on, particularly around the school holidays. Many of these are students or teachers.

Cergy Leisure Centre, France

- 4.25 This centre is located in the north western suburbs of Paris some 28 km from the city centre and forms part of a large, 250 ha recreational park containing lakes and a wide range of outdoor activities. The site is owned by the Ile de France regional council and the centre receives some subsidies from regional and local council sources.
- 4.26 The white water centre has facilities for rafting, kayaking and hydro speed activities. Other activities within the larger site include mini-golf, windsurfing, sailing, tennis/badminton, beach volleyball, archery, cable-ski, orienteering and bird watching areas as well as various extreme sports activities (e.g. outdoor

climbing wall, ropes/zip wires, bungee trampoline, zorbing) and a children's play area with karts and carousels. There are also walking and mountain bike trails around the site. A sailing school and adventure school within the site provide training for visitors.

Figure 4.1 Cergy White Water Centre & Leisure Centre, Paris



4.27

The site as a whole is believed to attract in the order of 1.5 million visitors annually managed by about 60 permanent staff and 120 seasonal staff. It holds a number of events throughout the year, both sporting and non-sporting and including rock concerts. There are also occasional film showings. There is

fairly low cost accommodation on site for groups with 141 bed spaces and nine rooms for meetings, conferences and functions such as weddings. A fast food restaurant has recently opened to complement a number of small snack outlets located throughout the site and a bicycle hire business but no retail units.

- 4.28 This white water centre was designed to be part of a large outdoor activities complex from the outset. There is no indication of other uses being attracted to the area as a result of it although there are several budget hotels nearby.

Cardiff International White Water Centre

- 4.29 This facility is an Olympic standard white water rafting centre which is part of the wider Cardiff International Sports Village in Cardiff Bay, within the Cardiff urban area. The village complex currently has a 50 m swimming pool and a temporary ice rink (Cardiff Arena) in addition to the white water canoeing and kayaking centre and there are plans for a snow dome and a hotel. It was envisaged that the complex would have an observation tower and a super-casino, although it appears unlikely these will now come forward.
- 4.30 The white water centre opened in March 2010 and offers a range of on- and off-site activities including: gorge scrambling; surfing; canoeing and kayaking; bushcraft; rock climbing; mountain biking; team building challenges and courses; and stag and hen night activities. In addition to the white water course, the centre also has access to extensive flat-water paddling areas. The centre also has a café with Wi-Fi access, two conference rooms, and a retail area.
- 4.31 Since opening in March 2010, the centre had attracted around 13,000 visitors (in January 2011) indicating an annual visitor figure of under 15,000. A significant proportion of these visitors come during competition events including 'Youth Freestyle', 'UK Premier Slalom' and local 'Paddlefest' which have been held since the centre's opening. Few visitors also visit other facilities in the sports village and there appear to be relatively few overnight stays associated with the centre at present. This indicates very limited linked visits to other facilities by white water centre users and therefore relatively limited agglomeration benefits of co-locating these facilities together.
- 4.32 The centre is run by Cardiff City Council and employs a small permanent staff of managers and administrative staff, as well as around 50 part-time seasonal instruction staff. These are recruited on an add-hoc basis and undertake a training and assessment course before appointment, similar to other centres in the UK, overseen by the British Canoe Union (BCU). This course has a relatively high drop-out rate, but does include a number of people previously inexperienced in canoeing and rafting.
- 4.33 As this centre only opened fairly recently and already forms part of a larger leisure complex where new uses are proposed, it has no plans to increase the range of facilities associated with the white water centre.

National White Water Centre, Canolfan Tryweryn, Wales

- 4.34 This centre is located in the Snowdonia National Park in North Wales and is based on a dam released river rather than being an artificial centre. Open since 1986, it provides white water rafting, canoeing and kayaking and attracts some 40,000 active visitors per year, with a further 40,000 coming to view or accompany users. This centre is self-funded, run on a commercial basis but with all profits used to develop facilities at the centre and canoeing in Wales.
- 4.35 It has a café but no other activities and no accommodation on the site. Despite this, it markets itself as offering weekend adventure activity breaks, for both a leisure and corporate market, including activities such as high ropes, mountain biking, clay shooting, pony trekking and canyoning although all of these are in locations over 30 minutes from the site. No additional facilities have been attracted in the surrounding area by the presence of this centre, with the nearest hotels 8 km away.

Other Sports Facilities

- 4.36 Given the limited experience of new investment around other white water centres, other types of participatory sports facilities were also considered. However, very few sports activities or related facilities were identified that could be considered comparable to the LVWWC in terms of scale and numbers and types of visitors. Indoor ski-ing centres (e.g. Xscape), such as those at Milton Keynes, Castleford, Tamworth and Braehead outside Glasgow, have some similarities in attracting active sports participation and tend to have a range of retail and leisure uses around them or built into the development.
- 4.37 For example, the **Xscape indoor ski-ing centre** on the edge of Glasgow adjoins a large regional shopping centre and retail warehouse park, which attracts some 20 million visitors annually, and includes an ice rink and events arena. The ski-ing centre development itself also contains 15 restaurants, 7 sports/leisure related retail units, a cinema, bowling alley, adventure golf and soccer activities, an aerial adventure course, rock climbing wall, free-fall activities and rides, a laser shooting area, and children's indoor play area. The Milton Keynes centre lies on the edge of the town centre retail area and contains broadly similar uses to Braehead but with a nightclub, comedy club, Virgin health & fitness centre, indoor skydiving and sports bar, replacing some of the uses found at the latter.
- 4.38 These centres successfully combine sporting activities with a range of retail and leisure uses to maximise visitor numbers and spending and create a major leisure destination. However, it is not clear that they provide many lessons that could apply at the LVWWC. They typically attract far more visitors, up to 3 million annually in some cases. They also differ in having urban locations adjoining established major visitor attractions and in having been developed from the start with a sports element as part of an extensive complex of commercial leisure/retail uses and drawing on these leisure visitors rather than vice versa.

- 4.39 The **MEPAL Outdoor Activity Centre** is set on the shore of an 8 ha lake in the Cambridgeshire Fens near Chatteris. It offers a wide range of affordable water and land based activities for families, school and youth groups and corporate clients. Activities include canoeing, kayaking, sailing, windsurfing, paintball, climbing, archery and zorbing (rolling/bouncing inside a 2 metre wide plastic ball). There is also a dedicated children's play area with special climbing and other facilities. Other facilities on the site include dormitories, dining room, lecture room, lounge, sports hall and an indoor climbing centre. It attracts some 15,000 visitors annually to water based activities but more to the adjoining playground. The centre is owned and run by a charitable trust and provides residential and day activities for Cambridgeshire schools and colleges but meeting all running costs from income with no public funding. It is run with six permanent staff and up to 15 more instructors and trainees from March to October. There are no proposals for a hotel or other commercial facilities nearby, partly because of the site's remote location but also because it is run as a charity.
- 4.40 The **Castle Climbing Centre** operates within a listed former water pumping station at Green Lanes in inner North London. Although it adjoins the Stoke Newington West Reservoir Centre, a large lake offering canoeing/kayaking with an adjoining café, the watersports centre is in different ownership, being run by a not-for-profit organisation on behalf of Hackney Council. The Climbing Centre provides several large climbing walls allowing various indoor climbing and abseiling activities in a controlled environment along with a range of courses. It also contains a large café, a shop selling climbing related equipment and clothing and offers sports massage, shiatsu, osteopathy and Pilates services. The centre also runs a variety of events designed for companies and organised groups. This facility is privately owned, is operated by 12 staff and attracts between 150,000-165,000 visitors a year. Visitors mainly come from Greater London and typically spend 2-3 hours there. Beyond its café and shop, the centre has no plans to develop more activities to maximise visitor spending as its ethos is to focus on climbing. There is also no evidence of other commercial leisure uses being attracted by this centre to the local area although the local pub reportedly benefits from the climbers, and frequent users have reportedly affected the local property market by buying homes near the centre.

Conclusions

- 4.41 Most of the centres reviewed provide for a range of white water activities. These include canoeing, rafting, hydro-speed (swimming with a small floating raft) and training for rescue services. These are usually available for both elite athlete training, local clubs and recreational/leisure use by the general public.
- 4.42 Very few Olympic legacy facilities have been developed to include more extensive commercial or other leisure uses of the type envisaged for the LVWWC. Indeed, very few of the 30 artificial white water centres identified by this study have developed much in the way of additional commercial leisure or other uses around them to try to create significant visitor destinations.

- 4.43 Only a few white water centres offer other recreation/sports activities on their sites. Where they have, these are concentrated on other outdoor and 'adrenaline' activities and are bundled into a package to create a full day or even weekend of activity for individuals, groups (e.g. stag/hen parties) and businesses (e.g. corporate team building days). Some of these (e.g. gorge scrambling) relate to the physical characteristics of the site and all may not be feasible at the LVWWC. However, other activities (e.g. zip-wires, high ropes courses, mountain biking and some climbing facilities) offer some scope to be developed on the LVWWC site or nearby.
- 4.44 Some complementary leisure and retail facilities, as well as accommodation, have been developed at a small number of centres. These often include specialist retail related to the sports activities on the site, modest eating & drinking facilities and accommodation (generally budget hostel/chalet on-site accommodation). Together with meeting/seminar rooms, these are used to provide facilities for inclusive conference, business tourism and education packages.
- 4.45 Many of the established white water centres also host a range of other events that attract significant visitor numbers, including canoeing competitions, trail races and music festivals, to take advantage of the on-site facilities and natural attractions in the local area and maximise revenues.
- 4.46 For those white water centres which have a cluster of other leisure attractions around them, these appear to have been planned and developed when the white water centre was established and formed part of an overall development scheme for the site, rather than new investment attracted by the white water centre's visitors. This indicates that where clusters of attractions have developed, they have done so in a coordinated manner and been part of a single marketed attraction e.g. USNWWC or Cergy.
- 4.47 No examples were found of a cluster of independent or even loosely related facilities which were not coordinated as part of a single attraction. If a critical mass of visitors is to be built, with a significant number of cross-over visits (i.e. people undertaking more than one activity) and agglomeration benefits, this indicates that development will need to be coordinated and marketed as a single attraction, albeit with multiple activities.
- 4.48 This review suggests that white water centres, and other comparable participatory sports attractions, do not by themselves tend to attract significant other leisure or visitor facilities around them, or develop organically into wider visitor destinations. This indicates that active intervention measures will be needed if the LVWWC site is to develop into a wider leisure destination that can bring significant economic benefits; it is unlikely to occur organically. This is because most 'demand' for visitor attractions must be created as is latent - i.e. it will not arise until consumers become aware of what is available.
- 4.49 However, there are several examples of leisure parks, with a white water centre at their heart, which have successfully developed into sizeable visitor destinations focused on outdoor recreation with between 400,000 and 1.5

million visitors annually, and supporting several hundred jobs, where activities, marketing and development are coordinated by a single organisation.

5.0 Development Opportunities and Constraints

- 5.1 Before exploring potential types of activities that could be attracted to the LVWWC site or the area around it, it is important to identify potential opportunities for new leisure development in this location but also understand any significant constraints on different types of uses and development that apply.

Opportunities

- 5.2 The LVWWC site is located on the edge of the UK's greatest urban conurbation with almost 8 million residents, many of which are relatively young, with higher than average disposable income and interested in outdoor activities. The site also has good road access, and reasonable public transport accessibility, to this Greater London catchment population from its position near the M25 motorway.
- 5.3 The Lee Valley Country Park attracts a large number of users already, an estimated 1.5 million p.a. with up to 4.5 million in the wider Regional Park. There are currently very limited opportunities for these visitors to spend money within the park and a relatively narrow range of leisure activities for them to participate in. More sports facilities, leisure and catering uses could capture some of this market.
- 5.4 The presence of other established visitor attractions near the LVWWC, such as Royal Gunpowder Mills and Waltham Abbey, also provides a wider, established visitor market which the LVWWC site could seek to tap into. The LVWWC, as an Olympic legacy facility, should be able to attract some elite athletes and events. It therefore provides a high profile feature that can act as a catalyst to help in developing this area as an outdoor activities visitor destination and stimulate leisure operators' interest. This may, however, have a limited time window to capitalise on after the Olympic Games finish.
- 5.5 At the same time, London has no established or widely recognised centre for adrenaline-type activities; there are some individual facilities scattered across London and Hertfordshire but no real focus for such activities. If properly marketed and branded, the LVWWC site has an opportunity to form the basis for such a centre.
- 5.6 There are some sites close to the LVWWC which are not subject to Green Belt or environmental constraints and indeed some are brownfield locations identified for development. The Hazelmere Marina site immediately south of Station Road, along with any surplus industrial land nearby, is an example.
- 5.7 These various factors, along with a view on market demand, need to feed into any consideration of what uses would have the best prospects of being delivered on this site.

Constraints

- 5.8 Against these opportunities need to be set potential constraints on new leisure development in the area.
- 5.9 As noted earlier, the Lee Valley Park itself, including the LVWWC site, lies within the Metropolitan Green Belt where strong constraints on planning permission for many types of built development apply unless very special circumstances can be shown. This is not an absolute constraint and would not necessarily affect outdoor leisure activities or prevent some indoor leisure uses. However, it may make it harder to achieve them within the park, and in some cases would require use of previously developed sites nearby.
- 5.10 In addition, various environmental designations apply within the Park. These include SSSIs, which could preclude many forms of built development and probably any noisy leisure activities that greatly disturbed wildlife e.g. quad bikes, water-ski-ing. Although such environmental protection areas immediately adjoin the LVWWC site, they do not include it.
- 5.11 The Park itself is also fairly narrow and dissected by the River Lee Navigation and several other rivers. A line of high electricity pylons run from north to south along the line of the River Lee within the country park. This limits the size of sites available for activities requiring large areas of unconstrained land in this area. However, these pylons do not cross the LVWWC site.
- 5.12 All the land immediately east of the LVWWC site, and parts of the LVWWC site itself, are subject to Flood Risk designations. Within the LVWWC site, only parts of it within the Environment Agency's Zone 2 designation. This would constrain some built development that accommodates many visitors but not necessarily outdoor recreation uses.
- 5.13 Further to the east of the LVWWC site, all of the Royal Gunpowder Mills land is designated as an Ancient Scheduled Monument as well as being in Green Belt. Part of the site is also contaminated from the previous use of the site and its structured landscape could restrict development. These factors would limit its potential to accommodate built leisure uses attracted to the area by the LVWWC, if the site's owners were interested in such development.
- 5.14 The electricity pylons nearby and the lack of mature trees in this part of the Lee Valley Park could also limit the areas where activities such as aerial ropes and zip wires could be established. This could be overcome on the LVWWC site by erecting artificial support structures.
- 5.15 The projected number of visitors for the LVWWC itself, at around 72,000 p.a., is not particularly large as a basis for attracting other uses, although since opening numbers have greatly exceeded expectations, with 12,000 visitors attracted in one weekend in April 2011. Also, this is an area that has not attracted commercial leisure development to any great extent in the past, and seen as more of an industrial location. It will therefore be important to change market and leisure operator perceptions of the area and, if carefully handled,

the profile of the LVWWC will help to some extent, although only for a limited time period.

- 5.16 Car parking provision on the LVWWC site is fairly modest at present, with some 119 spaces permitted and about 40 constructed so far. This, combined with fairly limited public transport choices, could be a deterrent to uses that draw significant visitor numbers.
- 5.17 There are a number of leisure facilities already existing or planned within the adjoining area, which would limit the scope to develop some types of activities within the LVWWC site or the Park. Although the planned golf driving centre at Waltham Abbey has been refused, there are three health & fitness facilities within a few kilometres, various hotels in the area (although mainly higher quality) and a canoe equipment shop opposite the site.
- 5.18 Lastly, as noted earlier, it will also be important that any proposed uses or facilities are compatible with the brand image of the Lee Valley Park. The 2020 vision for the Lee Valley Park describes the park as an internationally important environmental resource and its future for the park as an active leisure destination. This could constrain some larger built leisure facilities that conflict with environmental factors or affect the wider image of the park but not necessarily limit such development nearby.

Conclusions

- 5.19 From the above analysis, there are significant opportunities for further leisure development in this general location provided planning and environmental constraints can be overcome and market perceptions improved. These opportunities arise from proximity to the major population catchment of Greater London, the increased profile of the area from the Olympic LVWWC facility and the availability of some development land and established visitor attractions close to the centre.
- 5.20 The main planning constraint to further leisure development on the LVWWC site itself is its Green Belt designation, although this can be overcome for mainly outdoor recreational uses or where very special circumstances can be shown for built development. There are also issues of flood risk affecting parts of the site and the lack of parking for many visitors would need to be overcome.
- 5.21 There are greater constraints on development on adjoining land within the Lee Valley Park and the nearby Gunpowder Mills site. These relate to Sites of Special Scientific Interest, an environmental protection designation that would severely constrain many leisure uses, flood risk, Scheduled Ancient Monuments and high electricity pylons.
- 5.22 This indicates that consideration of the uses that could be developed in this area needs to be aware of potential development restrictions and identify types of facilities that could be fit within the LVWWC site and other Green Belt land within the park, and those that may need to be located on non Green Belt land nearby. The degree of development risk arising from planning and

environmental factors would also need to be taken into account when identifying facilities that could be promoted to the market. This does not necessarily mean that desirable forms of development will be restricted. It will be more of a case of ensuring that appropriate forms of development are directed towards the most suitable sites for them.

6.0 Market Appraisal

- 6.1 This section examines the strength of market demand for different leisure/business sectors in the area around the LVWWC. This has involved:
- a review of recent trends in leisure/tourism sectors, including adventure tourism;
 - drawing on the audit in Section 2 of existing and proposed leisure facilities and other visitor attractions in the study area;
 - Identifying the capacity/occupancy levels of current facilities where possible;
 - identifying current proposals for new facilities in leisure/business sectors in the area; and
 - discussions with commercial agents and operators where possible.
- 6.2 This process helped highlight any existing gaps in provision, and potential opportunities/locational criteria for new facilities that could work in this area and help to create a sports-related visitor destination.
- 6.3 To provide some context and narrow the scope of the assessment, it is important to emphasise that the study area around the LVWWC is a reasonably successful location for industrial uses and has several good quality hotels, reflecting a location near the M25 and the A10 strategic roads. The recent large News International printing/distribution centre at the A10/M25 junction is an example. However, this area is not one that has attracted significant commercial leisure uses in recent years, any major visitor attractions or large retail or office based uses. Other than the LVWWC, there are no obvious factors emerging that are likely to change that position. This market assessment therefore focuses on the leisure sector and the ability of the LVWWC to stimulate growth in that sector.
- 6.4 It is also important to make clear that this study is not a feasibility study on the market for the LVWWC and consequently does not challenge the visitor/user forecasts provided by the centre. The 2006 Strategic Leisure Business Plan information provided is somewhat dated but, in the absence of more up to date data, has been taken as providing the most accurate assessment of market penetration for the site.

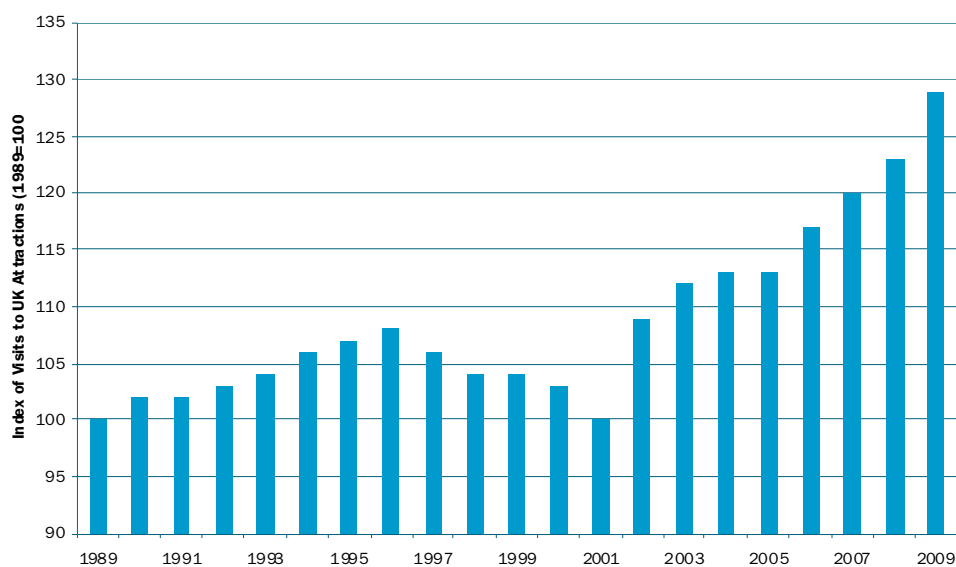
Tourism and Leisure Trends

- 6.5 The state of the economic climate can have a positive or a negative effect on the performance of visitor attractions. Much depends on the location of the attraction and the markets on which it draws.
- 6.6 The current recession has undoubtedly impacted on corporate hospitality and corporate entertainment markets and hence facilities that depend on these markets have felt a downturn in demand. Premium golf courses that depend on

corporate golf days, for example, have seen the market soften since the start of the recession.

- 6.7 However visitor attractions have also benefited from the 'staycation' effect of UK residents choosing to take a holiday in the UK rather than abroad. For example, 2009 was a positive year for domestic tourism with a 7% increase in domestic trips reported. This reflected a generally rising trend despite the recession (Figure 6.1). While business trips and trips made by those visiting friends and relatives struggled, domestic holiday trips saw an almost 12% increase on the previous year.
- 6.8 The 1,806 England visitor attractions in the national survey that provided visit figures for both 2008 and 2009 reported a 5% increase in visitor admissions overall in 2009. This was a notably stronger increase than in each of the past three years (2% in 2008 and 3% in both 2007 and 2006). The trend towards holidaying at home ("staycations") and away from overseas trips is likely to have been a contributor to this. There has also been a strong trend towards day trips with attractions reporting an 8% increase in visitors who live locally.

Figure 6.1 Index of Total Visits to Attractions in England



Source: Visitor Attractions, Trends in Visitors, VisitEngland 2009

- 6.9 New patterns of consumer spending reflect large changes in society, social habits and attitudes. Many of those changes, later childbearing, smaller family units, the increased emphasis on the individual, healthier living and anti-smoking campaigns - are ingrained, regardless of economic conditions.
- 6.10 Similar influences have also led to big changes in the overall pattern of leisure spending in recent years. These are most clearly seen in the drinking and dining out sectors: the growth of coffee shops, casual dining chains and gastro-pubs against the decline of the traditional pub and the bingo hall.

- 6.11 In terms of the Family Leisure industry, an evening at the cinema, taking the family out for a pizza or taking the kids to a UK leisure destination are all still regular leisure activities. Those leisure activities which are being cut are the larger luxuries such as foreign holidays and meals in fine dining restaurants.

Health and Fitness sector

- 6.12 Growth in consumer spend in the health and fitness sector grew rapidly between 2004 and 2007. Since then, expenditure in the sector has levelled off and the rapid growth halted as a result of a sharp fall in the number of new clubs being developed and opening partly due to the prevailing economic climate. The latest research suggests 23% of consumers have cancelled their gym membership as a result of the recession.
- 6.13 However, the continued publicity of the benefits of exercise, driven largely by the government, coupled with introductory offers offered by the health clubs and a greater awareness of “body image,” are all encouraging significant numbers of new members to join. The pressure on individuals’ discretionary spend has, however, impacted on the mid market sector and the UK has started to see growth in the budget health club sector.

Adventure Tourism

- 6.14 There are no definitive figures available for the size and value of the UK adventure tourism market. The United Kingdom Tourism Survey (UKTS) provides data on UK holiday visitor participation in some categories of adventure activity, including water sports and climbing. There is no available data on day visitor participation in adventure activities. The UKTS data that is available suggests:
- over 10% of UK holiday trips involve participation in adventure activities; the proportions are even higher for Scotland (15%) and Wales (17%);
 - at least 11 million UK holidays each year include taking part in an adventure activity;
 - adventure holidays account for something like 4% of all holidays.

Active Leisure Trends

- 6.15 According to recent market research, around half of all adults have less than 4 hours of leisure time on a typical weekday.⁵ There are signs that activity holidays are no longer just the preserve of young adrenaline junkies, but are becoming more ‘mainstream’, attracting more women, more over-50s and more families.
- 6.16 Walking/trekking is the most popular form of activity holiday, accounting for almost four in ten activity trips. A quarter of the adult population have been on a walking holiday at some point in their lives.

⁵ Mintel, Leisure Time, UK, February 2006

- 6.17 Comfortably-off, pre-family groups are the most likely to have been on an activity holiday, followed by third-agers. The family market has been hardest hit by the recession but shows strongest potential for new customers. The recession put a stop to five years of growth in activity holidays, with an estimated 16% fall in activity breaks during 2009.
- 6.18 More than half of UK adults feel that they should do a lot more about their health.⁶ However active leisure pursuits such as canoeing and kayaking are typically time-consuming. The need for training or coaching and the commitment required to having a series of lessons runs against the flow of the instant access consumer society. Whilst an increase in activity is on many people's to-do list, it has to be easily accessible (physically) and they have to be able to dip in and out of the activity as they feel inclined.
- 6.19 Access to active leisure pursuits is also restricted by opportunity and also often by cost. Activity holidays act as a valuable taster session for many leisure activities. Consumers have had both the time and the inclination to try things that they otherwise would not do at home. The market for active leisure pursuits is, however, dominated by occasional participation; those that do 'try it out' may not return for a reasonable period of time and consequently developers of specific facilities need large population catchments.
- 6.20 To some up recent changes and directions in the leisure sector:
- a there is a general trend towards new leisure experiences; current discussions on travel trends and tourism talk of escapism, adventure, authenticity and experience;
 - b the increased supply of facilities in these areas is opening up new alternatives to day visitors and tourists. Snow domes, indoor surfing, indoor skydiving, climbing walls, karting, rally driving, powerboat riding etc - the list of experiences available is now extensive. Increasingly people are trying new activities on holiday and wish to repeat the experience at home.
 - c over 10% of UK holiday trips involve participation in adventure activities.
 - d more than half of all UK adults think they should do more about their health and outdoor activity is seen as a positive action in taking more exercise.
 - e suppliers of specific active leisure pursuit facilities need large population catchments.
 - f the recent economic recession has stimulated holidays at home and has boosted numbers to visitor attractions across the UK.

⁶ Mintel, Active Leisure Pursuits 2008

Capacity and Demand for Existing Facilities

- 6.21 Occupancy of serviced accommodation in the East of England in 2009 was 51%, a drop of 3% on the previous year.⁷ As is the case in many non-tourism oriented destinations, weekday occupancy is higher than weekend.
- 6.22 Midweek demand for budget hotel accommodation across the country remains strong and many turn away business on Tuesdays and Thursdays. The growth of budget hotels in or near urban centres creates an increased capacity at traditional leisure times (weekends and bank holidays) which is often not filled.
- 6.23 The tourism growth strategy for Essex identifies poor quality of hotels and the lack of hotels in the right locations as issues weakening the performance of the area. The Essex Hotel Study (December 2009) identifies a number of opportunities for new hotel developments in the area, including possibilities for new budget accommodation near the M11 in Chigwell and Harlow.
- 6.24 A proposal exists to reopen the Dobbs Weir Caravan Park to the North of the LVWWC. A feasibility study is underway which will consider the phased expansion of the caravan park from its current 200 capacity and which considers the recreational facilities on site that would increase its attractiveness.
- 6.25 The demand for residential conference facilities in recent years has seen a decline as a result of the economic climate. The non-residential conference market has also softened. The public sector was historically a big buyer of conferences and this market is likely to decline and remain flat for the foreseeable future.
- 6.26 In the East of England, the most visited free attraction was the River Lee Country Park, followed by Fairlands Valley Park and Thetford Forest Park.⁸ In the paid attractions category, the three most visited were Colchester Zoo, Whipsnade Zoo and Woburn Safari Park. The results for 2009 indicate that overall there was a 6% increase in visitor volumes, a 7.7% increase in entry charges and a 10% increase in revenue for attractions in the region.
- 6.27 The main conclusions which can be drawn on capacity and demand from the above analysis are:
- consultation and desk based research points to a lack of quality to some extent in the accommodation sector, with a low level of budget accommodation, and more notably in other tourism facilities such as cafes and restaurants
 - occupancy data suggests that serviced accommodation performs better in the mid week periods than at weekends but with some capacity at weekends in all types of accommodation; budget hotels can be forced to turn business away Tuesdays and Wednesdays due to demand from the non discretionary business tourism market.

⁷ East of England Tourism

⁸ Visitor Attraction Trends in England, 2009

- the conference market has declined due to the recession and is likely to remain flat for some period of time.

Markets for the Lee Valley Park/LVWWC

- 6.28 The purpose of this study is to assess the potential of the LVWWC to strengthen the leisure offer of the Lee Valley Park through complementary leisure, tourism or business developments on sites within the Park or the adjoining area and to regenerate the area around the centre, as well as to identify how the economic benefits of the LVWWC to the surrounding area can be maximised. There are different drivers that need to be considered in assessing this.
- 6.29 Firstly it should be noted that the area in question has comparatively limited inherent tourism and leisure appeal. Whilst there are some attractions that would indeed be attractive to day visitors and tourists, such as Waltham Abbey, Epping Forest and the Country Park itself, in general the extent of this offer is not significant enough to act as a destination in its own right beyond a fairly local market and those visiting friends and relatives. The proximity of London with its own extensive offer acts as a strength (in terms of population catchments) and also as a weakness in that the competing London offer is very compelling.
- 6.30 Next, to assess the potential for the LVWWC to strengthen the leisure offer of the Lee Valley Park, consideration needs to be given to what new developments might be required by the users of the LVWWC. Furthermore, in order to consider how the economic benefits of the LVWWC to the surrounding area can be maximized, the behaviour of these users needs to be examined. Following this, types of visitors to the Lee Valley Park in general could be examined and consideration given to what facilities might fit with current and potential users of the park.

Users of the LVWWC

- 6.31 The business plan for LVWWC defines the potential user market as being:
- day visitors from London, Hertfordshire and Essex
 - tourists to Hertfordshire
 - tourists to the East of England
 - elite canoeists
 - international/national/regional squads
 - international and national event organisers
 - the University of Hertfordshire
 - Hertfordshire Regional College
 - local schools
 - local canoe clubs
 - local businesses
 - outdoor activity organisers

- local community organisations
- 6.32 In terms of actual visitors to the site, these users can be converted into the following groups:
- Independent day visitors
 - Corporate groups
 - Tourists
 - Event participants
 - Leisure groups
 - Educational groups
 - Specialist Canoeists
 - Event audiences
- 6.33 The 2006 Business Plan describes two alternatives for the LVWWC - a base case scenario and an enhanced option. The base case suggests that the number of users per year will be just fewer than 40,000, broken down into 20,000 rafters, 3,120 educational visitors, 520 corporate users and 3,950 or so on training courses. The remaining 12,400 are described as coming from community elite users, international federations and British Canoe Union (BCU) high performance users.
- 6.34 The second enhanced option predicts a usage of almost 72,000 p.a. of which approximately 14,840 are described as coming from community elite, international federations and BCU high performance. It is understood from the Lee Valley Park Authority that it is the enhanced option which has been constructed and users for this option can be broken into the following markets:
- 7,000 specialist canoeists
 - 4,000 recreational canoeists
 - 37,000 rafters
 - 6,240 education
 - 1,170 corporate
 - 8,736 courses
 - 200 international federations
 - 7,800 BCU high performance
- 6.35 The Business Plan visitor estimates are now somewhat dated and the LVWWC attracted 12,000 visitors in a single weekend in April 2011, shortly after it opened, and 20,000 visitors in the first four weeks. The majority of these visitors were spectators who had come to view the water activities. This suggests the 72,000 annual figure might be exceeded and that more casual visitors could be attracted if suitable facilities were provided.
- 6.36 According to Sport England, around 0.4% of the population participate in canoeing and kayaking⁹ though recent surveys indicate a significantly higher 2.6%.¹⁰ Those most likely to participate in these sports are described by Sport England (using Experian designed market segments) as Sporty Male professionals (early 30s active sport club members); Comfortable Mid-life Males (Mid-life professional, sporty males with older children and more time for

⁹ <http://segments.sportengland.org>

¹⁰ Source: Watersports and Leisure Omnibus Survey 2009 (Base: all respondents - 12,683 adults aged 16+)

themselves); and Competitive Male Urbanites (Male, recent graduates, with a 'work-hard, play-hard' attitude).

- 6.37 **Canoeists** using the site will be those that can demonstrate a level of proficiency. As the courses at LVWWC range between Grade 3 and Grade 4, paddlers will need to be BCU Three Star or at least be able to demonstrate a high level of competency. For this market, a trip to the LVWWC is sport participation. The users are there to pursue their hobby and, whilst they may use ancillary facilities whilst on site (café, shop etc), it is unlikely that they will be big users of other activities in the area. It is considered likely that the majority will come from within a reasonably short travel distance although the high profile nature of the course will also attract some 'sport tourists' from further afield.
- 6.38 **Canoeing events** are generally 'competitor driven', which means that spectator attendance levels are low in comparison to other sporting events.
- 6.39 **Rafters** will make up a significant share of the users of the LVWWC site. This user group will be made up of leisure groups (including Stag and Hen parties), independent day visitors, corporate groups, educational groups and tourists. The day visitors may include families though the current age restrictions on the site will mean that only families with children over the age of 14 (12 on the legacy course) will be able to participate.
- 6.40 **Corporate** users will make up a small part of the market although this may grow when the economy starts to recover. Corporate users may include day corporate events or multiple day events. The latter will require accommodation in the vicinity and other activities nearby.
- 6.41 **Educational visits** might include secondary school and further or higher education student trips. The LVWWC might form a fun part of a day out in the park linked to Key Stage 3 or 4 topics such as geography.

Market Assumptions

- 6.42 The only information made available on future visitor levels to the LVWWC is contained within the 2006 Strategic Leisure Business Plan which is 5 years old, is missing certain relevant appendices and does not therefore break the visitor numbers down into enough detail. In the absence of more up to date information, various assumptions have been made on the types of market that will be attracted based on consultation with comparator venues.
- 6.43 **Canoeists** are sports enthusiasts. They may engage in their activity more than once per week, but their time away from home is focussed on spending as much time participating in their activity as is possible. Consequently, they may use the café or ancillary facilities but most are unlikely to participate in another activity during the visit. Specialist canoeists may be drawn from across the UK to use the facility, particularly in 2013 when the draw to 'test' their ability on an Olympic venue is strongest. For the purposes of this study, it is assumed that 20% of the specialist canoeists would come from outside the study area. These

users will require accommodation, although in most cases this will be at the budget end of the market.

- 6.44 **Canoeing events** attract low spectator levels in comparison with other sporting events. Competitors seldom attract significant sponsorship and hence their own costs in relation to attending the event have to be contained. In addition, event participants spend a high proportion of time training or resting and hence their interaction with the local economy is more restricted. The extent of visitors from outside the area will depend greatly on the event and its profile. It has been assumed that, in terms of canoeing events, around 50% of visitors will be from outside of the area.
- 6.45 **Day Leisure Rafters** will be made up of leisure groups, independent day visitors and tourists. For many, the LVWWC will represent a day trip activity and hence a significant proportion of this market will be from within the 15 - 30 minute catchment. The tourist market might include those holidaying in the immediate vicinity, including those visiting friends and relatives and those that are staying in or around London but want an active experience as part of their leisure stay. A working assumption is that around 10% of all rafting visitors will be tourists.
- 6.46 **Corporate** users will make up a small part of the market initially although this may grow when the economy starts to recover. Corporate users may include day corporate events or multiple day events. The latter will require accommodation in the vicinity and other activities nearby. It is assumed that many of these users would be coming to day events for corporate firms based in London with perhaps 10% coming from further afield.
- 6.47 **Educational visits** might include secondary school and further or higher education trips. All of these trips will be from within a short distance.

Potential Facilities

- 6.48 In considering what type of facilities might be developed in this location to capitalise on the effect of the LVWWC and to maximise its economic impact, a number of criteria have been used:
- a fit with the Lee Valley Park brand (for uses within the Park)
 - b how well it would complement the LVWWC offer
 - c does not harm the current Lee Valley Park offer
 - d the existing competitive supply of similar leisure facilities in the area
 - e ability to form part of a marketable offer that has unique selling points
 - f can be developed in phases
 - g economic impact - will it attract visitors from outside the area
 - h the extent that it might attract private sector investment
 - i can demonstrate some potential to be viable
 - j can be developed in close proximity to other aspects of the offer whilst remaining outside of the park boundary.

- 6.49 In this process, account was taken of the potential population catchment and the study also drew on consultation with operators of similar facilities where these were willing to give views. However, some potential facilities do not have a recognised commercial operator and it is difficult for operators to comment on a possible future situation in terms of numbers of visitor numbers that could be attracted to this area.
- 6.50 In terms of the relationship between any new facilities and the Park brand, the 2020 vision for the Lee Valley Park refers to the parklands as internationally important environmental resources and describes the future for the Park as an active leisure destination; a green lung for London. The emerging logo/strap-line for the Park contains the phrase “*For nature, sport and discovery*”. Any proposed developments should not compromise this general aim.
- 6.51 Some of these assessment criteria are perhaps more difficult to assess than others. The viability of a venture requires a market feasibility study on that specific activity and in that specific geographical location. Whilst some lessons can be learned from similar facilities in other locations, local market conditions will be critical. Any potential developer or operator of such a facility would, of course, undertake such an assessment before making any investment decisions. However, until the opportunity is defined and marketed to operators it is difficult to be confident on the viability of the venture or of the likelihood of private sector investment.
- 6.52 A long list of options was shaped around these criteria to emerge with a shorter list of concepts that could be subjected to a product market fit analysis. Whilst activities such as off-road driving and quad biking would fit with an adrenaline type theme, these were considered as being inconsistent with the brand image of a ‘green lung’ and excluded from the shortlist.
- 6.53 Options were also considered within the context of the wider park, which offers facilities for:
- 1 water based activities using canals and lakes, including fisheries and opportunities for boating
 - 2 athletics, ice skating and horse riding
 - 3 numerous sites of local, national and international ecological value (including 8 SSSIs)
 - 4 camping and hostelling overnight accommodation
 - 5 heritage sites
 - 6 land that is used for a wide range of sporting, cultural and other events
 - 7 formal gardens
 - 8 farms - both a working farm and a visitor attraction
 - 9 award winning sites - including eight Green Flag open spaces, four highly commended Quest awarded leisure sites.¹¹

¹¹ Quest is the Green Flag equivalent for the leisure industry

6.54

The following product market fit Table 6.1 shows a number of different types of facility that are considered to fit with these criteria. It also indicates the appeal of certain facilities to different markets; a higher number of ticks shows a greater product market fit.

Table 6.1 Visitor Market Segment for Potential Leisure Facilities

	Independent day visitors	Day Leisure groups	Corporate groups	Educational groups	Tourists	Canoelists	Event participants	Event audiences
4 star hotel					√			
Budget accommodation					√	√	√√√	√√√
Camping/caravan					√	√√	√√	√√√
Outdoor Climbing wall	√√	√√	√√	√		√		√
Aerial ropes	√√	√√	√√	√√	√√√	√		√
Indoor surfing	√√	√√			√√	√		
Children's indoor play area	√				√			√
Health and fitness	√	√			√	√		
Conference facility			√√	√				
Restaurant/Bar/Café	√√√	√√√	√√		√√√	√	√√	√√
Outdoor activity linked retail	√	√			√√	√	√	√√
Events	√√√	√√	√		√√√	√		√
Archery	√√	√		√	√√			
Zorbing/Hydro Zorbing	√√√	√√		√√	√√√	√		
Zip-wire	√√√	√√	√	√√	√√√	√	√	√
Bungee Trampoline	√√			√√	√√			√
Golf Driving Range	√		√√		√√			
Bike Hire	√√√	√	√	√√	√√		√	√
Golf Frisbee	√√√				√			
Laser Clay Pigeon Shooting	√√√	√√	√√	√	√√			
Paintballing	√	√√	√√	√				
Go-karting		√√	√√		√			
Indoor Climbing Centre	√√√	√	√	√	√√			√
Laser Quest	√	√			√			
Sailing/Watersports	√√√	√√	√	√√	√√√	√	√√	√
Sports retail	√				√	√√	√√	√√
Large indoor sports/leisure facility	√√	√√	√	√	√√√		√	√√

Source: Tourism UK

- 6.55 This list is not exhaustive; rather it concentrates on those facilities that fit within this context. It includes facilities that have some form of link to the LVWWC and will therefore share some common visitor segments.
- 6.56 There are, of course, other facilities that could be considered such as outdoor gyms, environmental visitor attractions (e.g. hands-on renewable energy exhibits, ecology safaris, outdoor survival training) etc. However, these facilities are either non-income generating, are cost centres or bear little linkage with the LVWWC itself. Whilst they may be good ideas and may indeed add to the appeal of the park, they are independent of the LVWWC and should be assessed as such.
- 6.57 The facilities that are considered include additional activity centres, accommodation provision, food and beverage and retail, the latter reflecting the high numbers of casual spectators attracted by the LVWWC since opening. Events held in the park are also included in the product market fit exercise; these might be sporting related or cultural events. They may or may not use the LVWWC as a backdrop. Cultural events would appeal to the day visitor market and tourist market though these again should be considered as independent of the LVWWC.
- 6.58 Of course any development proposal will also need to consider future uses and changes in leisure demands and trends. Additional developments will be necessary in future years to refresh the appeal of the site, in which case further concepts may need to be assessed against the market appeal.
- 6.59 Using assumptions on the breakdown of visitors to the site, it is possible to quantify likely visitor levels for these different markets as follows:

Table 6.2 Size of visitor market segments

Segment	Day trippers	Tourists
Canoeists	22,000	5,500
Canoeing events	N/A	N/A
Rafters	33,300	3,700
Corporate Users	1,053	117
Educational Visits	6,240	0

Source: Tourism UK

- 6.60 In considering the additional facilities required by users of the LVWWC, levels of demand can be estimated using assumed penetration rates. If, for example, 1 in 10 of the rafters also used a high ropes facility, then this would convert into 3,700 users, probably insufficient to support the development cost or the running of such a facility. If 2 in 10 used the facility, then it would create a market of 7,400, probably enough to support a small easily run facility, although this would need more detailed examination.

- 6.61 The tourist visitor market attracted by the LVWWC site is estimated to be in the region of 10,000 per year. This will include existing visitors to the area that add an activity to their holiday programme and new visitors to the area attracted by events at the site or the opportunity to do kayaking or rafting. If it is assumed that the accommodation requirements of these visitors is in line with the current tourism market to Hertfordshire, then 59% of trips will be spent by visitors staying with friends and relatives, 36% will require serviced accommodation and around 2% will stay in caravan/camping accommodation.
- 6.62 Of course, East of England Tourism data includes business trips so these figures might underestimate the impact on the self-catering, caravan camping market. Notwithstanding this, the 10,000 tourists attracted by the site might support a demand (including existing demand) for around 3,600 serviced accommodation trips, and hence over 7,000 bed nights. In self catering (caravanning and camping) a demand for up to 1,000 nights might be stimulated.
- 6.63 From the product market fit exercise, it can be deduced that users of the LVWWC are most likely to use other adrenaline-type facilities and food and beverage facilities. However, the extent of the propensity for users to travel off the site must also be considered. It might be that only 10% of the users will travel off the site. This might therefore create a market of 7,000 people who will visit the local shops and cafés. It is anticipated that the current supply of such facilities could absorb additional demand at this level.
- 6.64 The above analysis indicates that the number of users of the LVWWC facility is not sufficient to create the level of demand that would, in itself, support the development of significant new facilities.

Users and non-users of the Park

- 6.65 Of course, the addition of any new facilities would not be entirely dependent on users of the LVWWC. The Park itself attracts around 4.5 million people annually, creating a large market for any new developments. What must be considered then is the extent to which any facilities might appeal to existing users and non-users of the Park. These will include a full range of visitors from different profiles and life stages, including the family market.
- 6.66 What the LVWWC will undoubtedly do is to increase awareness of the park and its facilities. The high profile nature of the Olympic venue and its continued use after the event will create opportunities to promote the park to current non-users. As the business plan for the LVWWC notes, a market of 9 million people lives within the Greater London area providing a sizeable market for any potential development while a further 2.7 million live in Hertfordshire and Essex.
- 6.67 If options for development are considered within this larger market, then some uses become more viable. In other words, it is not that the LVWWC will attract a market that supports additional facilities, rather additional facilities provided in the Park could capitalise on the increased profile created by the LVWWC and create a critical mass of reasons to visit.

6.68 The viability of any potential facility would therefore need to be considered against different markets; i.e. current users of the Park, current non-users of the Park within easy reach of the site, and users of other facilities such as the LVWWC.

Conclusions

6.69 In identifying the types of uses that could reasonably be expected to be attracted to the area, it is important to consider first those that could come to the LVWWC site or very close to it in the shorter term to build on the presence of the LVWWC itself. Other uses in the longer term are considered separately.

Uses on LVWWC site/Lee Valley Park

6.70 The LVWWC is predicted to attract around 72,000 users per year. As indicated above, some of these users will be sports participants enjoying an opportunity to try out their skills on a demanding course. Such users will use any typical ancillary facilities on site such as the café but it is unlikely that they will do much else during their visit.

6.71 Many users will be rafters. This market does not require a level of pre-gained skill and is open to everyone (age limits do apply). This market could be encouraged to extend their stay or to return to do another activity if facilities were provided and were well marketed.

6.72 The LVWWC lies within easy reach of a huge population catchment and within a park which already attracts 4.5 million visits per year and hence a market exists that could be attracted to other new facilities provided near the LVWWC.

6.73 Whilst the LVWWC users will create some increased demand for services such as accommodation, food and beverage and retail, this demand appears likely to be quite limited. However, if the high numbers of casual visitors attracted initially continues, this would support such facilities earlier than expected. Where the real impact will be felt is in the catalytic effect that the LVWWC development could have on the site and local area.

6.74 The development of the LVWWC and its visibility before and during the Olympics will raise the profile of this part of the Park as a possible day visitor and tourist destination. On its own, it will stimulate market interest in the Park and in what else is available. Given the nature of the LVWWC, it is likely that the interest it stimulates is in those markets that are looking for an adrenaline-type activity rather than 'quiet enjoyment'. To capture this interest and to turn it into actual demand and new visitors will require a number of other things to be in place:

- other activities that appeal to this market;
- a strong marketing initiative that promotes the range of activities that are available and how easy it is to reach them from London;
- packages for tourists, stag parties, hen parties etc; combining two or more adrenaline-type activities.

- 6.75 Any new facilities should, of course, fit with the Park brand. It is envisaged that most additional facilities would most likely be non-motorised to fit within the Park environment. It is possible that other adrenaline activities, such as off road driving, quad biking, wind tunnel skydiving, paintballing etc, could be added to the product mix, but these would need to be positioned off-site to ensure that the 'Green Lung' brand is not tainted.
- 6.76 The types of activities that could be developed within the Park close to the LVWWC and which will fit with this market would include high ropes, zip wires, mountain biking, climbing, indoor surfing etc. The larger than expected number of casual visitors to the LVWWC site shortly after the centre opened might also suggest scope for café / restaurant facilities at an earlier stage.

Critical Mass of Users

- 6.77 As noted above, the 72,000 LVWWC visitors is simply too low to create sufficient demand for certain types of new facilities to emerge on site or in the local vicinity. Hotel developers, cafés, shops, for example, would need evidence of a much greater increase in demand to justify new investment.
- 6.78 To significantly increase visitor numbers to the area will require a bigger attraction or a combination of other attractions. What the LVWWC can do is act as a catalyst for further development. Such additional attractions and activities will have the greatest impact where they have some form of leisure activity connection to the LVWWC. Developments should therefore be active, adrenaline-type facilities rather than ones relating to passive enjoyment.
- 6.79 In this way, the collection of activities (including the LVWWC) can be marketed under a theme. This new Lee Valley Park 'activity zone' can develop its own identity and become a destination in its own right. Whilst the activities and developments should be 'active' facilities, they can be developed to appeal to a range of age groups and levels of excitement. What is important is that collectively the developments possess a uniqueness that makes the site desirable across the catchment area and that the individual parts fit together as a coherent set of facilities that from the consumers' perspective appear to be part of a single offer.
- 6.80 If a number of additional attractions or facilities are combined with the LVWWC and are actively promoted to the large population catchment, then a critical mass of facilities emerges which could attract a larger number of visitors, who in turn will demand other ancillary services such as cafes and restaurants and eventually even hotels.
- 6.81 From the range of potential activities identified, it is unlikely that those with relatively low market appeal will individually or even collectively attract sufficient visitors to stimulate demand for significant new ancillary services. Rather it is the larger activities that draw high numbers of visitors that combined with the LVWWC would have this effect.

6.82

Consequently, it is considered that a combination of white water sports, zip wires, high ropes course, indoor surfing, indoor climbing and, perhaps in the longer term, a large indoor sports facility such as a snow dome, would create a combined collection of activities which would then stimulate further private sector development to satisfy demand. Such development might include budget hotel accommodation, camping and caravanning provision, cafés, restaurants and some specialist shops. Notwithstanding this, the LVWWC will create a boost in confidence in the area and this could be used to attract interest from developers and operators in bringing forward the above facilities.

Table 6.3 Potential Facilities

Facility	Location
Short Term (could be developed immediately)	
Archery	On /beside LVWWC
Zorbing/Hydro Zorbing	On/beside LVWWC
Zip-wire	On/beside LVWWC
Aerial Ropes Course	On/beside LVWWC
Bungee Trampoline	On/beside LVWWC
Golf Driving Range	Within Local Area
Bike Hire	On/beside LVWWC
Outdoor Climbing Wall	On/beside LVWWC
Golf Frisbee	On/beside LVWWC
Laser Clay Pigeon Shooting	Within Local Area
Paintballing	Within Local Area
Children's Indoor Play area	Within Local Area
Medium-term (requires critical mass of visitors)	
Indoor Surfing	On/beside LVWWC
Go-karting/Indoor Karting	Within Local Area
Indoor Climbing Centre	On/beside LVWWC
Laser Quest	Within Local Area
Health & Fitness Club	Within Local Area
Sailing/Watersports	Within Local Area
Long-term (requires established leisure destination)	
Restaurants/cafes/bars	Within Local Area
Sports retail	Within Local Area
Budget hotel	Within Local Area
Large indoor sports facility *	Within Local Area

Source: Tourism UK/NLP * This is included to allow for some as yet unspecified larger facility attracting many visitors

- 6.83 It also needs to be emphasised that it is not inevitable that any shorter term leisure development achieved within the Park will eventually lead to a critical mass of visitors and creation of a larger visitor destination. To achieve these further levels will require other actions such as active promotion and marketing and other measures that can help make this an attractive leisure destination.
- 6.84 It is also important to emphasise that this initial assessment of potential uses which could work in this location should be explored in terms of viability/feasibility with a prospective operator/developer before moving forward on any specific activity. This will provide the most robust indication of its deliverability although this should not necessarily restrict the Park from bringing forward some facilities itself where viability is less uncertain.

Comparators

- 6.85 Lastly, it can be useful to examine other broadly similar centres of adrenaline sports/leisure activities to get a feel for what can work, even with more limited catchment populations than the LVWWC.
- 6.86 It has to be noted that the nature of what is being considered at the LVWWC is somewhat different to any other development across the UK. National and regional parks tend to offer a core mix of gentle passive enjoyment and environmental activities. Mountain biking, cycling, outdoor children's play areas, mazes, horse riding and water based events can be found at many such parks, from Clyde Muirshiel to the New Forest. Other natural environment experiences can be enjoyed at Forest Enterprise facilities such as Dalby Forest in Yorkshire, Hamsterley in Durham and Sherwood Forest where a partnership with Go Ape provides a high wire experience.
- 6.87 In Bedgebury Forest in Kent, a project (partly funded through an Active England project) saw the development of cycle tracks, 11 large pieces of children's play equipment, a Go Ape course, an events programme and archery courses; resulting in an increase in visitor numbers from 40,000 to 200,000 over a short period of time.
- 6.88 Another way of looking at what is proposed is to examine theme parks such as Alton Towers and Thorpe Park. Each of these has developed over time, continually adding new facilities and changing to attract new audiences. Alton Towers turned from a gentle leisure park in the 1970s to a theme park in the 1980s with the addition of the Corkscrew. In 1980 when the new ride opened hotel accommodation in the area was very limited. Since then hotels have opened in and around the park, the resort itself now has two hotels and a conference centre.
- 6.89 Thorpe Park grew from a modest water based attraction with 300,000 annual visitors into a diversified family oriented visitor attraction with hotels, almost 1.9 million visitors and 1,100 employees by gradually adding more "adrenaline type" iconic attractions, active marketing, rebranding it as wider leisure destination and continually refreshing the original leisure offer (see Appendix 3).

6.90 In France, it is common to find adventure parks such as the 'Indiana' ventures' in Samoens. Here parks follow the river and at strategic locations open up to provide a mix of outdoor activities. The parks also connect to other offers which whilst they can be booked from the park require the participant to be taken or to travel to another area. For instance, rafting and paragliding can be arranged and whilst these activities often finish at the park the starting point is a short distance away. The parks at Samoens offer a combination of mini golf, archery, high ropes, zip wires, rafting (on the river) canoeing, swimming, tennis and cycling etc.

6.91 Drawing from these different models, it can be seen that:

- a consumers of parks enjoy facilities that are outdoor-related and have a connection to the environment in which they are found;
- b a range of outdoor facilities can be marketed as part of the package even when some of these activities are off-site;
- c leisure attractions need to continue evolving to continue to attract audiences and that, as audiences grow, ancillary facilities are required to provide for the needs of these consumers.

7.0 Economic Impacts

7.1 This section identifies the potential levels and types of development that could realistically be attracted to the area around the LVWWC under different time periods and different pictures of future economic and consumer spending growth over the next five years and beyond. It also assesses the economic impacts of these different development scenarios in terms of employment, visitors and spending, covering both positive and negative impacts.

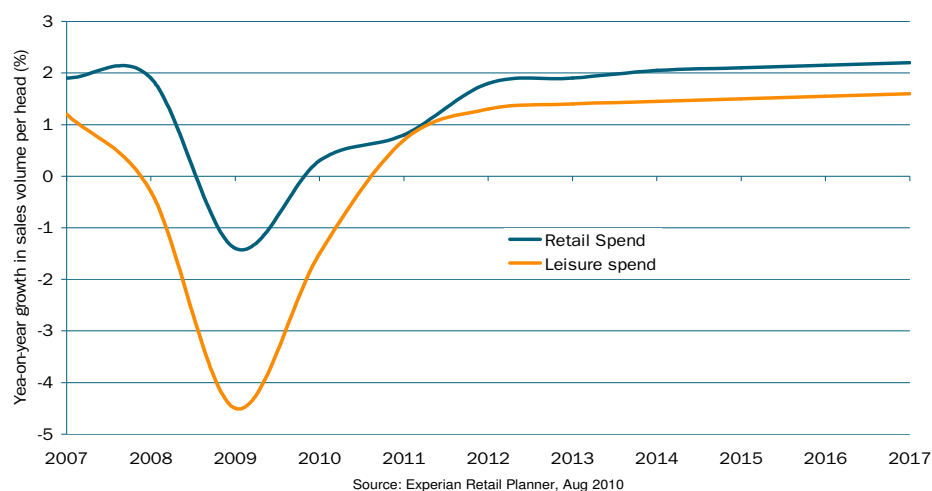
Economic Growth Context

7.2 The first step is to consider future pictures of economic growth in the UK over the next five years and the likely levels of business investment and consumer expenditure growth associated with these.

7.3 The Government's Office of Budget Responsibility (OBR) 'central' forecast up to 2015 assumes relatively low recovery from recession initially with growth in household consumption forecast to be low. GDP growth of around 2.6% per annum is expected with business investment growing by only 0.9% p. a. and private consumption by 1.1% p.a. The strongest regions for economic growth between 2011 and 2015 are expected to be London, followed by the South East and East of England regions.¹²

7.4 Looking at future leisure and retail spending, which may be more relevant to the LVWWC, Experian's forecasts up to 2017 and beyond indicate this type of spending recovering to pre-recession levels but growing very slowly after 2011 (Figure 7.1).

Figure 7.1 Forecast retail and leisure spending



¹² Cambridge Econometrics forecasts, July 2010

7.5 Table 7.1 below illustrates the differences in leisure and retail spending levels predicted under different economic scenarios and compared with past trends; for low or medium economic growth, which now appears more likely, spending levels appear likely to be lower than in the past.

Table 7.1 Average GDP & Leisure/Retail Volume Growth per head 2011-15

Annual Volume growth per capita	Pre-recession (2007)	Low Economic Growth	Medium Economic Growth	High Economic Growth
GDP	2.5%	1.0%	2.2%	2.5%
Retail spending	1.9%	0.8%	1.8%	1.9%
Leisure Spending	1.2%	0.6%	1.3%	1.4%

Source: Note: Based on Experian forecasts in Retail Planner (Aug 2010); Leisure growth for low and high scenarios based on relationship between forecast retail and leisure spending growth under the Experian Medium (Central) Forecast

7.6 However, the precise levels of GDP and spending are less important to future development potential around the LVWWC than the general economic conditions and levels of development activity and investment likely to take place under different future situations. Drawing on the above sources, three possible scenarios of future growth could be identified.

Moderate (most likely) Growth Scenario

7.7 This scenario would reflect the consensus view for the UK economy in the coming years, i.e. stable growth, albeit at slightly slower rate than seen in the UK during the 12 years up to the 2008/09 recession, and retail/leisure spending growth of around 1.5% p.a. This would reflect the effects of public sector expenditure cuts, subdued consumer spending from high debt levels and economic uncertainty, a less buoyant housing market and a reduction in business investment. Bank lending and development finance would improve but slowly. Under these conditions, it would be reasonable to expect:

- a some modest development of new leisure/tourism facilities in the study area;
- b a preference for smaller, viable schemes rather than more speculative larger schemes; and
- c the majority of growth coming in relatively low cost segments (e.g. outdoor recreation, budget hotels).

Low Growth Scenario

7.8 This assumes that UK economic recovery falters, potentially resulting in a 'double-dip' recession. Overall, there would be much lower spending growth than before, potentially just 0.5% per annum. This could come about as a result of domestic factors such as further falls in the housing market and weak private sector employment growth, or potentially due to external shocks such as a Eurozone sovereign debt crisis. Sluggish growth would result in unemployment remaining high, while weak consumer markets and business

confidence would depress investment levels and household spending. Development funding is also assumed to remain very tight for longer.

- 7.9 Under these conditions, developers and operators appear less likely to expand or invest in new facilities reliant on consumer or business spending, particularly in new, untried or more marginal locations or with more innovative facilities where the risks are high. Investors would be more likely to focus on improving existing facilities through expansions or upgrades and any new provision would likely be limited to smaller scale facilities in more established locations.

High Growth Scenario

- 7.10 In this scenario, global growth and trade recover strongly. Buoyant UK exports, with a strongly recovering manufacturing sector and service sector growth approaching the 1995-2007 rate would produce a more balanced economy with strong private sector activity. Unemployment will fall strongly towards pre-recession levels and new investment levels would be strong as development finance becomes readily available. This would result in higher retail/leisure spending growth, perhaps more than before the recession. Under these conditions, it would be reasonable to assume:
- a developers and operators being more likely to expand or invest in new retail/leisure facilities;
 - b reasonable prospects of visitor facilities attracting related consumer facilities e.g. hotels, restaurants, sports retailing, conference facilities;
 - c a greater share of expensive/high quality facilities and attractions, and the potential for some of these to be in more marginal locations.

Implications for Development in the Study Area

- 7.11 The next step is to estimate what impact these different scenarios might have on the scale, type and timing of development related to the LVWWC in the study area. This exercise involves professional judgment based on market demand, the strengths of the area and experience of similar situations elsewhere.
- 7.12 It is important to recognise that some elements of the commercial leisure and outdoor activity markets may not be greatly affected by different economic growth conditions. For example, as noted earlier, when national economic conditions are poor and consumer spending depressed, this may lead to more people taking domestic holidays or opting for short breaks rather than longer holidays. With a large catchment population close by, this situation might be more beneficial to leisure activities linked to the LVWWC. Also, even when the economy is at a lower ebb, there is always likely to be demand for facilities close to London that provide a day-out for families. Such activities are now less seen as discretionary spending with personal spending cuts focused more on expensive meals or holidays.
- 7.13 Conversely, if economic conditions and consumer spending are stronger, this may channel more investment into higher value uses and put more pressure on sites and buildings that leisure uses requiring lower cost land/premises could

otherwise have utilised. These types of factors are likely to reduce the differences between economic growth scenarios in terms of their effect on investment in leisure uses.

- 7.14 A stronger constraint on some types of development would be the availability of development finance and general property market conditions, where developers' perceptions of risk may be higher. Such factors have been very important in reducing commercial property activity, especially speculative development, over the last few years. In this context, most of the potential leisure uses identified in the previous section would require fairly low levels of capital investment and are less dependent on stronger consumer spending. Many of these could therefore be expected to come forward under all economic growth scenarios and be developed in the short term.
- 7.15 A number of indoor leisure uses will require larger, better fitted-out buildings and require greater capital investment. These are also uses that are more sensitive to consumer spending. These are perhaps more likely to require moderate economic growth conditions and easier funding availability. As noted earlier, these would be expected to come forward in the medium term, but only once visitor numbers at the LVWWC site have built up. While wider economic growth conditions might affect the timing of such investment to some extent, its delivery is probably more dependent on these other factors, such as achieving critical mass of visitors, promoting and improving perceptions of the location.
- 7.16 Reflecting these factors, Table 7.2 estimates which facilities are likely to come forward over a 10-15 year period under different economic/spending scenarios. It suggests that only a few larger facilities that require more investment, and where operators will be more sensitive to visitor numbers, would not come forward under all economic conditions.
- 7.17 On that basis, the types of projects and timescales for coming forward under each economic growth scenario would be very similar to the picture identified, in the previous section, where projects would come forward earlier or later depending on how quickly visitor numbers to the area can be built up and the area established as a leisure destination. There would be very little difference, therefore, in the mix of uses likely to come forward over the initial five year period, whatever the background economic growth position is.

Table 7.2 Likely Deliverability of Different Facilities under Different Economic/Spending Scenarios

Facility	Low Spending Growth/Finance Availability	Medium Spending Growth/Finance Availability	High Spending Growth/Finance Availability
Archery	✓	✓	✓
Zorbing/Hydro Zorbing	✓	✓	✓
Zip-wire	✓	✓	✓
Aerial Ropes Course	✓	✓	✓
Bungee Trampoline	✓	✓	✓
Golf Driving Range	✓	✓	✓
Bike Hire	✓	✓	✓
Outdoor Climbing Wall	✓	✓	✓
Golf Frisbee	✓	✓	✓
Laser Clay Pigeon Shooting	✓	✓	✓
Paintballing	✓	✓	✓
Children's Indoor Play area	✓	✓	✓
Indoor Surfing	✓	✓	✓
Go-karting	✓	✓	✓
Indoor Climbing Centre	✓	✓	✓
Laser Quest	✓	✓	✓
Health & Fitness Club	✓	✓	✓
Sailing/Watersports	✓	✓	✓
Restaurants/bars		✓	✓
Sports retail		✓	✓
Budget hotel		✓	✓
Other large indoor use			✓

Economic Impacts

- 7.18 An estimate has been made for each potential use/facility of its likely level of visitor numbers and the approximate level of employment that each could support. These estimates are based on data drawn from existing facilities elsewhere and from the general experience of the consultant team. In some cases, consultations with existing operators informed this estimate. It should be noted, however, that these are merely estimates and that any private sector developer would wish to undertake their own market appraisal to test viability. Table 8.7 sets out this information.
- 7.19 In terms of visitor numbers, if all the above facilities were developed, this Table suggests there could cumulatively be in the order of 600,000 visitors p.a. attracted to them, and potentially over 1 million p.a. if a large visitor attractor or other indoor sporting facility could be brought to the area. This number could be increased if events were held although this may conflict with other activities. However, some of these visitors would be using several different sporting facilities on their visit and some facilities (e.g. hotel, restaurants) would be simply feeding off the visitors to the sporting activities but not attracting them

in their own right. The actual number of visitors to the area could therefore be significantly less than 600,000, perhaps only half to two thirds of that level.

Table 7.3 Potential Visitor & Employment Impacts by Potential Facility

Facility	Location	No. of visitors p.a.	No. of Jobs
Short-term (could be developed immediately)			
LVWWC/BNU	On/beside LVWWC	72,000	~60
Archery	On/beside LVWWC	1,000	<5
Zorbing/Hydro Zorbing	On/beside LVWWC	2,000	<5
Zip-wire	On/beside LVWWC	5,000	<10
Aerial Ropes Course	On/beside LVWWC	25,000	10
Bungee Trampoline	On/beside LVWWC	5,000	<5
Golf Driving Range	Within Local Area	10,000	<5
Bike Hire	On/beside LVWWC	1,500	<5
Outdoor Climbing Wall	On/beside LVWWC	2,000	>5
Golf Frisbee	On/beside LVWWC	1,000	>2
Laser Clay Pigeon Shooting	Within Local Area	2,000	>5
Paintballing	Within Local Area	2,000	>10
Children's Indoor Play area	Within Local Area	45,000	>10
Total Short term		~173,000	~140
Medium-term (requires critical mass of visitors)			
Indoor Surfing	On/beside LVWWC	12,000	>10
Go-karting/Indoor Karting	Within Local Area	10,000	<5
Indoor Climbing Centre	On/beside LVWWC	25,000	10
Laser Quest	Within Local Area	20,000	<20
Health & Fitness Club	Within Local Area	180,000	30-40
Sailing/Watersports	Within Local Area	7,000	<5
Total Medium Term		~254,000	~90
Long-term (when established leisure destination)			
Budget hotel	Within Local Area	35,000+	60
Sports retail	Within Local Area	15,000+	10
Restaurants/bars	Within Local Area	~120,000	30
Other large indoor facility	Within Local Area	~500,000	50
Total Potential		600,000 - 1,100,000	330-380

Source: NLP/Tourism UK

Employment / Job Opportunities

- 7.20 This analysis also suggests that, even if the LVWWC site and the area around it develops into a significant visitor destination focused on adrenaline sports, the scale of economic impact associated with this facility, and further uses drawn to the area around it, would be significant but relatively modest in scale. The maximum number of jobs supported, including about 60 jobs in the LVWWC itself, appears likely to be in the broad range 330-380 dependent on whether a large scale, indoor visitor attraction can be delivered.
- 7.21 Summarising the potential employment generation in terms of both time periods and different economic conditions, it is clear that job levels are likely to be modest over the first five years or so. It is also evident that job numbers are unlikely to be affected greatly by economic conditions applying over the next 10 years or so but would be over the longer term, depending whether visitor numbers have built up sufficiently to be able to attract a wider range of built leisure uses (Table 7.4).

Table 7.4 Employment growth by growth scenario (Cumulative)

Scenario	0 – 5 years (No. of Jobs)	6 - 10 years (No. of Jobs)	10+ years (No. of Jobs)
Low Spending Growth/ Development Finance	130	220	220
Moderate Spending Growth/Development Finance	130	220	330
High Spending Growth/Development Finance	130	220	380

- 7.22 Based on typical employment patterns in the leisure sector, it is possible to obtain an indicative breakdown of these job estimates by employment status (full-time/part-time) (Table 7.5).

Table 7.5 Indicative Job Breakdown by Status of Job (Year 10+)

	No. of Jobs	% of Jobs
Seasonal Jobs	94	25%
Non-Seasonal Jobs	276	
Full-time	122	35%
Part-time	154	40%
Total Jobs	380	
FTE Jobs	256	

- 7.23 It is important to make the point that perhaps a quarter of all these jobs could be seasonal.¹³ This would apply particularly to jobs based on outdoor recreation activities, which will be affected by weather and hours of daylight, even if floodlighting can be applied to part of the LVWWC site. It therefore emphasises the importance of trying to attract more indoor based activities, even if this will be in the longer term or outside the Park.
- 7.24 For the non-seasonal jobs, it is indicated that a significant proportion of these will offer part-time employment. This largely reflects the nature of the leisure sector and the types of activities likely to be attracted to the site. Nevertheless, such jobs can offer employment opportunities to those requiring more flexible working hours, and this group often includes those among which unemployment is higher and deprivation greater.
- 7.25 Table 7.6 shows an indicative breakdown of the LVWWC related jobs by broad occupation group/skill level. This breakdown is based on national occupational profiles for the active leisure and the hospitality sectors. It indicates that the jobs will span a fairly wide range of skill levels with significant proportions at both higher levels (managerial/professional) and lower skill levels (elementary and sales/customer service). This would provide a reasonable match with sought occupations of unemployed residents in the study area. Section 10 considers approaches to maximise the local benefits of these jobs.

Table 7.6 Cumulative Job Levels by Occupation Group

Occupation Group	0-5 years (No. of Jobs)	6-10 years (No. of Jobs)	10+ years (No. of Jobs)	% of Jobs
Managerial/Professional	30	54	84	22%
Associate Profess/Technical	16	30	42	11%
Admin/Secretarial	13	23	38	10%
Skilled Manual	22	29	43	11%
Personal Service	10	22	36	9.5%
Sales/Customer Service	8	17	35	9%
Plant/Process Operative	5	6	8	2.5%
Elementary (Unskilled)	36	50	97	25%
Total	140	230	380	100%

- 7.26 The new jobs created directly at the LVWWC site and in the area around it will support further indirect jobs in the area. This will result partly from wage spending by these workers in local shops and services and partly from the leisure facilities sourcing goods and services from local suppliers. Such indirect impacts (or multiplier effects) can be estimated by applying a typical local employment multiplier to the total number of direct jobs associated with the LVWWC. In this case, taking account of the nature of the new leisure jobs

¹³ This assumes 50% of jobs in outdoor recreational facilities and 10% of jobs in indoor facilities are seasonal posts

and local economic conditions, using a multiplier value of 1.2 would indicate some 50 further jobs supported locally by the impacts of the LVWWC.¹⁴

Other Economic Impacts

- 7.27 Other economic effects of establishing a sizeable cluster of leisure/sporting activities in this location will include increased visitor spending in the local area and potentially some effects on the local supply chain.
- 7.28 It is difficult to estimate with any precision what proportion of visitors to the LVWWC and related leisure uses will spend money elsewhere in the local area, for example in Waltham Abbey town centre shops and cafes or in petrol stations or restaurants elsewhere in the wider study area. If it were assumed that 430,000 visits were attracted by all facilities combined, after allowing for some visitors using several facilities, this might equate to 290,000 actual visitors to the area. If it were assumed that the average visitor spends £4.40 outside the LVWWC site, this would produce some £1.4 million of income in the local economy.¹⁵ A similar calculation for the longer term when between 600,000 - 1,100,000 visitors could be attracted, would produce between £1.8 and £ 3.4 million of spending locally.
- 7.29 As noted earlier, some indirect employment could result in the wider area as a result of both wage spending by leisure facility employees and expenditure on goods and services by the leisure facilities themselves. Some of this supplier spending should therefore benefit local businesses in the wider study area. It is very difficult to quantify this and the effect is likely to be modest in scale given that national leisure operators may source services centrally. However, with encouragement towards local procurement, it could include buying goods from local food producers, canoe equipment suppliers, and wholesalers, and using local services for landscaping, equipment and site maintenance, deliveries, printing, or site security.
- 7.30 There will also be some local economic impacts from the construction activity involved in developing new leisure facilities in the area, and in the continual upgrading and refreshing of attractions that is common in the leisure sector. This should benefit some construction firms based in the wider study area. It is difficult to estimate the extent of this effect without a clear picture of which facilities will be developed and what capital investment is involved. In the initial shorter term stage, the benefits from construction activity would be expected to be modest in scale given that most facilities involved would be outdoor recreation that would not require major buildings or infrastructure.
- 7.31 In the longer term, more significant construction benefits could arise. For example, based on typical costs to build an indoor ski-centre (£23 M), a budget hotel (£5 M) and a health & fitness centre (£10 M), these would produce in the

¹⁴ Employment multiplier of 1.2 applied to 256 direct FTE jobs

¹⁵ Average spend per capita on food, drink, fuel, gifts, local products etc in UK Day Visit Survey, 2005 adjusted for 2010 prices.

order of 330 person-years of temporary construction employment, some of which could be filled by local residents.¹⁶

Conclusions

- 7.32 The scale of employment generation over the next 10 years or so appears unlikely to be greatly constrained by future economic conditions and consumer spending growth. What will be more important will be whether the area can widen its range of leisure facilities around the LVWWC so as to build up sufficient visitor numbers that can attract some larger scale uses.
- 7.33 The level of job generation associated with the catalytic effect of the LVWWC will be significant for the area and comparable to levels found on similar developments elsewhere. It should be possible to support up to 330 jobs directly, including within the LVWWC itself, and potentially up to about 400 if some larger scale leisure uses can be attracted.
- 7.34 Including indirect or spin-off jobs, the total impact on local employment could be as much as 430 jobs in the longer term.
- 7.35 These new jobs will contain a reasonably wide range of opportunities at different skill levels, with a significant proportion of both higher level managerial posts and lower skilled jobs. This range of jobs should provide opportunities for many of the unemployed residents in the area.
- 7.36 A significant proportion of these new jobs are likely to be seasonal in nature and part-time. This reflects the nature of the leisure sector generally. To increase the job benefits, a focus on attracting more indoor sporting facilities will be important. Approaches to maximising the local benefits of these jobs are considered in the following section.

¹⁶ Based on ratio of turnover to employment in the UK construction sector in 2009 of £113,700.

8.0 Infrastructure Requirements

- 8.1 This section identifies improvements to infrastructure that would be required to support any new development around the LVWWC, including both physical infrastructure (roads, parking, footpaths etc.) and social-infrastructure (e.g. employment training etc).

Physical Infrastructure

- 8.2 The adequacy and usage levels of current road, public transport, cycle and pedestrian routes serving the site were considered against likely requirements from different types of facilities over different timescales/levels of growth, and the need for improved road or other transport infrastructure identified to create strong, accessible connections which focus on sustainable travel and promote walking and cycling. This assessment was informed by discussions with relieving local highway authorities and town councils and from review of the transport assessment prepared for the LVWWC.

Road Access

- 8.3 The area close to the LVWWC is fairly well served by road links, lying between junctions 25 and 26 of the M25 motorway around London junction and 2.5 km from the A10. The site itself lies on the A121 (Station Road) which links to the M25 junction 26 and various main roads into central London.
- 8.4 Consultation with Hertfordshire and Essex County Highways authorities has revealed that the A121, and in particular its junction with the A10, is already under strain at peak times. This could restrict the amount of new development which could be accommodated in the area. Broxbourne Council and Hertfordshire County Highways currently have some long-term plans for various improvements to the A10 and its junctions, although these are currently unfunded and uncommitted. In any case, such improvements would have a limited impact on the capacity of the A121 itself, and there are no plans for any improvements to this road or others in the vicinity of the LVWWC.
- 8.5 However, it is unlikely that the type of journeys made by leisure visitors will place particular strain on the highways network at traditional 'peak' times (i.e. the morning and evening weekday 'rush hours'). This is because the peak times for visiting the LVWWC or other associated leisure uses are likely to be weekends and afternoon/evenings. Indeed, the transport section of the Environmental Statement for the original LVWWC planning application estimated that the centre itself would only have a 0.2% impact in the morning traffic peak, and a 0.6% impact in the evening peak. It also indicated significant spare capacity on the local road network at other times.
- 8.6 Clearly, the scale of visitors which could be generated in the area if it were to develop into a more broadly-based 'visitor destination' would be much greater than the 70,000 envisaged for the LVWWC. However, based on the low scale of

impact estimated by the Transport Assessment for the LVWWC alone, the overall scale of impacts on the local highway network would still appear likely to be relatively low for 350,000-4000,000 visitors. This position would have to be examined in more detail if any facilities attracting a very high level of visitors sought to locate nearby.

- 8.7 As a result, provided that the majority of development is in the leisure and recreation sector (as is likely), local highway capacity appears unlikely to be a significant constraint to future development, especially if more can be done to promote alternative forms of transport to the area, such as public transport, walking and cycling and encourage leisure visitors to use them.

Parking

- 8.8 Planning permission exists for 119 cars parking spaces on the LVWWC site, although not all of these have yet been constructed. Consultation with the LVWWC has revealed that the site's management is expecting all parking provision to be fully utilised when the Centre is at peak operation. However, the original Transport Assessment submitted with the planning application for the centre estimated that the peak parking requirement would be approximately 100 spaces for 72,000 visitors.
- 8.9 The early experience of 20,000 visitors to the LVWWC in the first four weeks of opening also suggests that visitor numbers may significantly exceed the planned 72,000 figure.
- 8.10 In either case, this indicates that additional parking will be required in order to accommodate any significant additional leisure development in the area. A very broad indication of future parking requirements can be derived by extrapolating from the original Transport Assessment assumptions, with some adjustments to reflect differing travel patterns of visitors to the new leisure developments.¹⁷ This indicates that if all the short-term facilities were to be developed (attracting 101,000 extra visitors), a further 70 on-site car parking space would be required. If all the medium-term facilities were to be developed (implying a further 254,000 visitors) then a further 170 spaces (or 240 additional spaces in total) would be required.
- 8.11 If this level of on-site car parking could not be provided on or beside the site, other alternatives could be considered, including using other existing parking in the surrounding area, or, as at other tourist destinations, a park and ride system could be developed to bring visitors to the site from car parks further afield.
- 8.12 During the Olympic Games, a park and ride system will be utilised to provide access to the LVWWC site. This will run from two locations, Hertfordshire

¹⁷ It has been assumed that two-thirds of visitors to individual leisure developments would be genuinely additional (i.e. they are not already counted in the visitor numbers for another attraction in the area), that 20% would use public transport to reach the site (excluding those to the LVWWC) and that there would be a further 25% reduction in car parking requirements as a result of larger family/group visiting sizes for the broader range of leisure attractions in comparison to the white water centre. A contingency of 20% additional spaces above this base requirement has also been assumed.

University, Hatfield (close to the A1) and North Weald Airfield, Epping (close to the M11). However, due to the operational requirements of both sites, it is unlikely that these facilities would be available on a permanent or even seasonal basis.

- 8.13 There is a variety of other parking provision in the local area, as shown in Table 8.1 below. Consultation with Waltham Abbey Town Council and others indicates that provision within Waltham Abbey town is currently reasonable and very rarely fully utilised. In particular, the Cornmill car park is close to the centre and has capacity, particularly at ‘off-peak’ times when there is likely to be the greatest demand from leisure users. Some parking also exists within the nearby Royal Gunpowder Mills site but this site is not open every weekend.

Table 8.1 Car Parking Provision in the Local Area

Capacity (approx)	Name	Distance from Site
Waltham Abbey		
100	Abbey Gardens (free)	1.3 km
200	Cornmill (pay & display)	0.6 km
75	Darby Drive (pay & display)	1.0 km
80	Quaker Lane (pay & display)	1.0 km
400	Tesco, Sewardstone Road (free, but only for retail users)	1.5 km
160	Highbridge Street Retail Park (free, but only for retail users)	0.3 km
Waltham Cross		
290	Pavilion Shopping Centre	1.3 km
80	Eleanor Cross Road	1.2 km

Source: NLP Analysis

- 8.14 This indicates that, although some additional parking to serve new leisure facilities could be accommodated in Waltham Abbey, there is still likely to be a requirement for additional on-site parking associated with any new development. The high level of parking demand by visitors since the LVWWC opened, exceeding on-site provision, emphasises this point. As such parking would potentially require significant amounts of land, this could potentially limit the locations in which development could be accommodated, and would probably direct some uses to locations beyond the immediate vicinity of the LVWWC site. A Travel Plan for the LVWWC site/leisure uses cluster would help minimise future parking and highway infrastructure requirements.

Public Transport

- 8.15 In terms of public transport, the LVWWC is reasonably accessible. Waltham Cross station lies within 0.7 km and is on the Liverpool Street to Cambridge line, with branches to Hertford and Stansted Airport, and 4 services per hour. Theobalds Grove station (1.5 km from the site) is on the London Liverpool Street to Cheshunt line, with a frequency of 2 trains per hour. Cheshunt station

lies around 2 km to the north, accessed by a walk through the Lee Valley Park. This will be the main access point to the centre for train travellers during the Olympic Games and benefits from a more regular and faster train service of 8 per hour to either London Liverpool Street (in around 22 minutes) or Stratford.

- 8.16 There is also fairly good access to the LVWWC by bus. Three bus routes run along Eleanor Cross Road/Station Road between Cheshunt, Waltham Cross, Waltham Abbey and Epping or Loughton. Two routes run north from Waltham Cross to Hertford and Harlow. Five other bus routes link Waltham Cross with Enfield and various other parts of North London serve the site. All routes passing the site are shown in Table 8.2 below which highlights the cumulatively very regular frequency of services to Waltham Cross and Waltham Abbey, in particular.

Table 8.2 Buses passing the LVWWC

Number	Route	Frequency
211/212	Waltham Cross - Breach Barns/Waltham Abbey	1 per hour
213	Waltham Cross - Epping	1 per hour
240/250	Waltham Cross - Debden	2 per hour
251	Hammond Street - Upshire	3 per hour
255	Waltham Cross - Loughton/Debden	2 per hour
555	Harlow - Loughton	1 per hour
C3	Hoddesdon - Epping	1 per hour

Source: NLP Analysis

- 8.17 There are no plans for future increases in capacity in either bus or train services in the local area. It is understood that existing bus services currently have spare capacity even at peak times, and it is likely that leisure developments would primarily generate off-peak demand in any case. Furthermore, it is anticipated that bus frequencies could improve over time if visitor numbers to the area greatly increased. However, existing services are likely to be adequate for a moderate increase in visitor numbers, particularly if links between the LVWWC and the various nearby railway stations can be improved.

Pedestrian and Cycle Links

- 8.18 In order to encourage visitors to use train services to and from the LVWWC and associated leisure development, it is important that pedestrian and cycle links between the stations and the LVWWC area of a high quality. Links between the visitor attractions and nearby centres such as Waltham Abbey will also be important in ensuring that the wider area receives an uplift in visitor numbers and spending as a result of leisure developments around the centre.
- 8.19 Currently, there are a number of north-south pedestrian and cycle routes passing through the Lee Valley Park and running close to the LVWWC site. In particular, the Lee Navigation towpath provides links south to Central London and Stratford, and north as far Hertford. This path also connects the centre to

Cheshunt railway station, although it is understood that the path does not currently benefit from artificial lighting which could discourage its use, particularly outside of the summer season.

- 8.20 In terms of east-west links, the routes from the centre to Waltham Cross station and Waltham Abbey town centre (along the A121 station road) lack dedicated cycle/pedestrian paths and are relatively unattractive. There are also some initial proposals being supported by Broxbourne Borough Council and Hertfordshire County Council to slightly re-align the A121 in order to create a dedicated cycle/pedestrian path along this road which would improve links significantly. However, it is understood that these plans are at an early stage of formulation, are not currently included in the Local Transport Plan, and do not have funding. They therefore appear unlikely to come forward in the short term, but remain a longer-term aspiration. Nonetheless, they remain a key action which could improve access to the centre, improve its attractiveness for the development of new facilities, increase visitor numbers to Waltham Abbey and maximise the economic benefits of the LVWWC and associated development.

Utilities

- 8.21 In terms of utilities, while no detailed investigation has been undertaken for this study, the LVWWC site lies reasonably close to residential and commercial areas and has clearly obtained adequate water and power supplies for the LVWWC itself, so that no significant constraints appear likely for moderate levels of new leisure development nearby. Again, this position would have to be examined in more detail if any particularly power hungry facilities were seeking to locate nearby.
- 8.22 Drawing this together, physical infrastructure requirements related to leisure development around the LVWWC are expected to be relatively modest, with no particular requirements and potential to improve both road and public transport capacity. However, additional provision of parking will be required with any additional development, and implementing plans for a dedicated cycle/pedestrian path between Waltham Cross station, the LVWWC and Waltham Abbey town centre will be crucial to encouraging modal shift, and to ensuring that significant economic benefits of development are captured by these centres. Key requirements would therefore be:
- a investigate how additional car parking could best be provided in the area to accommodate increased visitor numbers;
 - b support improvements to pedestrian links between the LVWWC site and Waltham Abbey and Waltham Cross town centres and nearby rail stations;
 - c consider measures to improve public transport access by visitors including a combined all-day ticket to the LVWWC site with discounted local bus/train or park and ride fares.

Job Skills/Training

- 8.23 It is also important to consider the jobs opportunities likely to be available at the LVWWC site, how these relate to local skill levels and what is needed to make these accessible to local residents and maximise the local benefits.

Context

- 8.24 Section 3 set out the labour market context in which the LVWWC operates. Key points are:
- the local area around the LVWWC generally has an above average concentration of worklessness, while the wider area has broadly average levels;
 - the wider study area has a skill profile similar to the national average, with numbers of graduates lower than the London average but above that for the East of England. However, the proportion of those without skills is above average for both regions.
- 8.25 More immediately significant than the rates of unemployment is the fact that more than 30,000 people in the three local authority areas immediately surrounding the LVWWC – Broxbourne, Enfield and Epping Forest – are unemployed and looking for work.
- 8.26 The area around the LVWWC is fairly prosperous by national standards with good prospects for long-term economic growth, albeit with some short-term difficulties as the country re-builds after the recession. That is good news for employers who are recruiting: the evidence suggests that, with the exception of a very few specialist skills, employers in this area have no great difficulty recruiting the people they want, and are unlikely to have any difficulty for the foreseeable future.
- 8.27 It is not such good news for those who are looking for work, especially if they have low or no skills, and low or no qualifications. That is partly because there is great competition for low-skilled jobs (the market rewards those who can stand out from the crowd: simple ability to do a job is not enough), and partly because it is easy to overlook the less-skilled when promoting economic growth.
- 8.28 It is also worth pointing to the geography of the area surrounding the LVWWC. It is very close to the boundary between Broxbourne and Epping Forest, with Enfield only a little to the south. Add in the three top-tier authorities - Essex, Hertfordshire and London - and the Park Authority itself, and that means seven public administrations with an interest in ensuring that local people get access to available jobs. With very large numbers of jobs to be filled, that multiplicity of interest could be an advantage: with modest numbers in the short term, and beyond, effort might be better focused through a single process.

Job Benefits

- 8.29 The LVWWC, and other attractions which might develop around it, will be valuable because they offer jobs now and in future, because many of those jobs are open to less-skilled people, and because the Centre is already offering skill training to help the unskilled to take up specialist jobs.
- 8.30 The most immediate and straightforward opportunity for economic benefit from the LVWWC will come from the jobs created, and others which will be created through seasonal and event-time opportunities. This section therefore considers those job opportunities, and others related to them, and how partners might make the most of them.
- 8.31 It is tempting to look for a single number and say that “the LVWWC has created X jobs”, but no single number like that really does justice to the range of types of opportunity which the Centre will bring. There are already some permanent jobs, and there will be more, both for people with high level white water skills and for support staff with much lower skill levels. There will also be seasonal jobs, and a need for a pool of others who can be brought in on a casual basis when demand justifies it. And there will be further opportunities for volunteering and work experience.
- 8.32 Looking at the types of job opportunities at the LVWWC in more detail:

Table 8.3 Job types at the LVWWC

White water expertise: most of these staff will have to be recruited initially from other parts of the country because people with relevant experience have had no opportunity until now to enjoy their sport in the South East. The Centre Manager is, however, very keen to ensure that most of the second generation of expert staff can be recruited locally, including from people who have trained from scratch at the Centre.	
• Centre Manager	The post holder has competed internationally for Great Britain, and previously worked at Holme Pierrepont, the Nottingham white water centre.
• 3-4 Duty Managers	All have white water experience, and one is the current captain of the Great Britain men’s white water rafting team.
• Raft Guides	These are roles for white water enthusiasts with relevant certification, who are keen to get paid to work at the Centre, to be near their sport. Those with permanent contracts will get ‘annual hours’ contracts, working out to 35 hours x 52 weeks and paid in equal monthly instalments, but much busier in the summer, and quite possibly with no work in winter. Others will have quite unrelated permanent jobs and work in the Centre on a casual basis, as required.
• Kit Issuers	Exact numbers will vary depending on usage, with the Centre using a pre-booking system to help it judge how many casual staff are required at any one time.
Other technical expertise, typically recruited sub-regionally:	
• Technical Manager	A role that would typically be filled sub-regionally, i.e. within commuting range, rather than necessarily very locally.
Non-technical roles, recruited locally:	

• 3-4 receptionists	Jobs requiring only modest previous experience, likely to be filled very locally. Believing that skills can be taught, the Centre Manager is primarily concerned to recruit on the basis of personality (i.e. to find people who will fit with the ethos of the Centre and help every customer to have a great experience), and to provide any necessary training.
• 3-4 catering staff	
• 2 cleaners	

8.33 Events, such as national team selection events, will provide further job opportunities - though only modest in scale. For the three-day event which the British Canoe Union (BCU) is arranging from 30 April to 2 May, for example, the BCU itself is likely to bring around 50 volunteers, who are experienced in staffing such events. Additional employment at the Centre is therefore likely to be limited to an additional post or two in the café. There will, of course, be other economic benefits to the locality from the money which these volunteers and others leave behind, through their accommodation, meals, and other spending. For larger events, such as the international event in 2015 for which the BCU is competing, there will be more scope for temporary jobs (e.g. to staff the VIP tent).

8.34 It will be clear from this that the LVWWC provides a wider range of job opportunities than can readily be counted in a single number of jobs provided. There are likely to be around 20 permanent jobs, with perhaps 50 people in total employed full-time during the summer months, with a good number of casual posts in addition.

8.35 It will also be clear that, though the norm is to count 'full time equivalents', it is more useful here to focus on the number of people who benefit, whether through an annual salary or a daily fee. The recent report by Professor Alison Wolf on vocation education made the important point that:

"A large volume of research confirms that the best predictor of being employed in the future is being employed now; and also that temporary and part-time jobs can play a significant and important role as stepping-stones to longer-term and more permanent employment."

Volunteering

8.36 Beyond jobs, the LVWWC offers related opportunities through volunteering, work experience and internships. Many of these (and especially the latter two categories) offer 'economic' benefit to participants because they help them to improve their economic circumstances. There may also be some minor economic benefit to the Centre through sales in the café.

8.37 There are 1.9 million regular volunteers in the active leisure, learning and well-being sector across the UK (equivalent to 54,000 full time equivalent jobs) and much of the sector would find it difficult to operate without the help of these unpaid staff.¹⁸

¹⁸ Skills Active, Sector Skills Assessment, 2010

- 8.38 The Park Authority provides opportunities for some 850 people to volunteer, who contribute over 16,000 hours of their time: volunteering is a major part of the way the Lee Valley Park operates. The Authority supports volunteers in a variety of ways including free training, such as for the 'Level 1 official' certificate. Many volunteers will seek no economic benefit from what they do, but some will, and will use it as a step in their career path. More may be encouraged to do so if there are opportunities for them.
- 8.39 As with permanent jobs, volunteering opportunities may be permanent (i.e. all year), seasonal, casual or event-related. They may also require more or less skill, and volunteers who go on the water at the LVWWC (e.g. as additional crew supporting disabled visitors) will need to hold the right certificates.
- 8.40 The Centre Manager and the Park Authority's Volunteering Manager are due to meet soon to consider what volunteering opportunities the Centre can offer. Volunteering during the 2012 Games itself is, of course, being handled separately through the London 2012 Organising Committee, which is recruiting some 70,000 'Games Makers'.

Work Experience

- 8.41 There is no commonly accepted distinction between the terms 'work experience' and 'internships' and the latter has grown in prominence in recent years. In this report we distinguish between the two as follows:
- work experience: all school children in England are currently required to do five days work experience, which typically takes place in Year 10 (i.e. the first year of their run-up to GCSEs).
 - Internships: are similar in nature to work experience, but we use the term here for college and university students studying more advanced qualifications such as a BTEC National or a Degree in sports science. Education providers are keen that their students experience the reality of the working environment for which they will become qualified, and many courses require it.
- 8.42 Though the LVWWC itself is small in employment terms, it benefits from being part of a much larger organisation, the Lee Valley Park Authority, and is therefore able to offer a more sophisticated range of opportunities, using approaches designed and managed centrally within the Authority.
- 8.43 So far as can be ascertained, the Park Authority is not taking advantage of the opportunity to work with local universities through the Knowledge Transfer Partnership (KTP) programme (www.ktponline.org.uk), a long-running initiative which enables organisations to benefit from temporary employment of a talented individual with continuing support from their sponsor university. KTP placements are typically used for technical advice, for example by Hill Holt Wood social enterprise in Lincolnshire, which formed a partnership with Lincoln University to support the design of new eco-buildings and other developments. Other organisations have used KTP placements to support management and marketing initiatives, and the latter in particular may be worth exploring.

8.44 The existence of the LVWWC is likely to instil in some local people a real enthusiasm for the sport - and an interest in developing a career related to white water sports. The Centre Manager is keen to promote such thinking, through training, casual jobs and, in time, permanent ones.

8.45 There may be a further opportunity through promoting the personal development opportunities which white water training develops, something which might be of particular interest to local organisations working with demotivated or disengaged young people.

Promoting Opportunities to Local People

8.46 Recruitment to these jobs at the LVWWC and other opportunities is through normal Park Authority channels, (because the Centre's employees are Park Authority employees), including open advertisement on the Authority's website. As total volumes are small, and the Park Authority already has established procedures to build on, it is recommended that any further effort to promote jobs and other opportunities to local people should be managed through the Park Authority, rather than creating (and trying to fund) a new initiative.

8.47 For example, the Authority is currently working with Harlow YMCA on a project to provide a permanent range of typically eight-week voluntary opportunities to long-term unemployed people, in order to help them get back into work. As the programme establishes itself, it should be possible to extend it to the LVWWC.

8.48 To ensure that full advantage is taken of these opportunities, two further recommendations are made.

8.49 First, the Park Authority should invite all its delivery and service partners to advertise their jobs on the Authority's own website (with applicants following up directly with the employer exactly as they do now). This would mean that the website showed *all* the job vacancies in and around the Park in one place, making it easier for both jobseekers and those who advise them. For new contracts, and for existing contracts on renewal, the Authority might consider *requiring* its partners to post their vacancies on the website. Many partners will also be happy to advertise their association with the Park Authority and provide a direct link from their own website, which will help support the Authority's wider ambitions. The cost is likely to be very small for all parties.

8.50 Secondly, the Park Authority could provide a link on its website to careers advice, so that anyone interested in considering a career in the sports and active leisure sectors can easily find relevant information. The simplest way to do this would be to provide links from the 'jobs', 'education' and 'volunteer' web pages to the excellent careers pages supported by Skills Active, the Sector Skills Council, at www.u-xplore.com/online/dsl/skillsactive-2.5/ue.asp

Jobs at Future Leisure Facilities

- 8.51 The Park Authority and its partners could also adopt the same approach to the 250-300 or so other jobs which are in prospect (see Table 7.2) through other leisure facilities whose development might be stimulated by the LVWWC i.e.:
- accept that some specialist roles may need to be filled from outside the area initially, but institute a programme of training to ensure that local people are able to fill the more skilled jobs when they become available;
 - identify the less-skilled roles - which primarily require customer-facing skills (and a warm personality) - and ensure that they are advertised to local communities through the Park Authority's existing arrangements, supplemented as necessary with new requirements to ensure that independent operators fall in line with Authority procedures;
 - ensure that new facilities tap into other Authority processes for accommodating volunteers and work experience placements wherever possible, so that maximum use is made of whatever opportunities exist.

Training

- 8.52 Training for further roles which might be created is likely to follow a similar path to that for roles at the LVWWC itself, namely:
- specialist training for individual sports and facilities (most of which is likely to be short courses provided direct by individual sports federations, with little or no scope for combination to create economies of scale);
 - management training, which is widely available, through both private and public providers, and in both accredited and non-accredited formats (i.e. both leading to formal qualifications, and as short, skill-based, modules). Smaller, less formal, leisure providers are unlikely to commit to formal management training beyond anything which is legally required;
 - customer service skills, which are also widely available.
- 8.53 Different facilities are likely to need training for their staff at different times, and with fairly low volumes, which makes it hard to achieve any economies of scale or wider benefits. It also makes it much less likely that any local college would consider establishing a course dedicated to the LVWWC and associated attractions. Most training associated with the Centre has been, and is likely to remain, "in house", with only a small numbers of learners placed on external courses in management, catering and customer service, which are all readily available at local colleges.
- 8.54 The nearest college to the LVWWC is Hertford Regional College, which has one of its two main centres in Broxbourne (the other in Ware), and also an advice centre ('First Steps') in Waltham Cross. The Broxbourne campus offers a range of relevant job training and vocational qualification courses, at the college or within workplaces. These include part-time NVQs in sectors such as hospitality & catering and retail, essential skills for business including customer service and marketing, up to degree level courses. Short training courses are provided

in management, customer service, health & safety, catering and electrical installation. Apprenticeship programmes are also offered in fields such as customer service, sport and construction.

- 8.55 Enfield College (now part of 'The College of Haringey, Enfield and North East London') is also nearby, in Enfield itself, and may be better located for any staff who live south of the LVWWC. There is competition between colleges (and, indeed, other providers) to run such courses and therefore scope to 'shop around' to get the best deal.
- 8.56 As a further possibility, the Park Authority may be able to make places on its internal courses available to leisure facility providers at a discounted rate, as many larger employers do.
- 8.57 As the volume of leisure-related activity grows, so does the scope and opportunity for the Park Authority to fund apprenticeships for aspirant leisure facility managers. Indeed, an apprenticeship managed by the Park Authority would have the advantage of offering apprentices a well-rounded opportunity, with the chance to try their hand at a wide range of facilities both under direct management and (if at all possible) also those managed on contract. The Government (through the Department for Business, Innovation and Skills) is very keen to promote apprenticeships and is providing additional funds at a time when other training is being cut. Skills Active, the Sector Skills Council for the active leisure sector, would be the place to start in designing an apprenticeship programme.

Conclusions

- 8.58 Additional physical infrastructure that would support the development of the LVWWC site and adjoining land as a wider visitor destination includes:
- a improvements to footpaths between the LVWWC site and nearby town centres and rail stations;
 - b provision of additional car parking or better use of existing parking provision in the area to accommodate increased visitor numbers;
 - c measures to improve public transport access by visitors including a combined all-day ticket to the LVWWC site with discounted local bus/train or park and ride fares.
- 8.59 Preparing a Travel Plan for the LVWWC site/leisure uses cluster would also be beneficial to maximise non-car journeys and hence minimise future parking and highway infrastructure requirements.
- 8.60 In terms of maximising local access to the new jobs, potential measures include:
- a the Park Authority inviting all leisure operators and its delivery and service partners to advertise their jobs on the Authority's own website; less-skilled roles are advertised to local communities;
 - b the Park Authority providing a link on its website to careers advice;

- c planning permissions/ S106 agreements for new leisure uses could require a specified proportion of local recruitment, or funding for a job brokerage scheme administered by the Park Authority;
- d ensuring that new leisure facilities tap into Park Authority processes for accommodating volunteers and work experience placements;
- e the Park Authority making places on its internal courses available to leisure facility providers at a discounted rate;
- f establishing links with established training providers such as Hertford Regional College to ensure suitable courses are available and workers in the leisure cluster facilities can be placed on them;
- g the Park Authority funding apprenticeships for leisure facility managers.

9.0 Spatial Development Framework

9.1 Following the identification in previous sections of a potential mix of uses that could be developed in the area around the LVWWC and the potential economic benefits linked to these, this section provides some guidance on the spatial distribution of such facilities, and how they could be linked and accessed to help create a wider visitor destination. It thus provides a broad vision for how the area could be developed in the next five years and beyond.

9.2 The resulting 'spatial framework' highlights several key areas and links:

- a it groups the potential facilities/activities into spatially defined 'activity zones';
- b it highlights a number of 'opportunity sites' which have been identified as having potential for development by the various local councils; and
- c it highlights existing and potential physical and functional linkages between these areas, sites and facilities and how they could be improved in the future.

9.3 The framework focuses on the local area around the LVWWC and Waltham Abbey/Waltham Cross, but also identifies links to facilities within the wider area. It aims to identify an achievable vision for sustainable growth around the LVWWC and takes into account the spatial distribution of existing facilities, different networks of movement through all modes of transport and the integration of green and blue infrastructure.

9.4 It also indicates opportunities for new investment, analysing how these locations are currently connected to the movement network and where improvements to connectivity could generate economic and social benefits. In particular, it highlights where improvements to the actual and perceived links between different areas and facilities could be made. This is important as it could potentially increase visitor numbers and expenditure in the area. In all of this, the location of existing facilities has been taken into account.

9.5 This spatial framework could be used in a number of ways in the future. These could include providing a basis for area masterplans or Area Action Plans, promoting development opportunities to developers and investors, and in supporting any funding bids.

Key Linkage Concepts

9.6 The linkages identified are at two geographic scales - strategic and local. At the strategic level, the wider area linkages and existing facilities and context (within approximately 4 km) have been identified and mapped to create a schematic plan of activities (Plan 1). At the local level, various interventions have been identified on Spatial Framework Plan 2: Linkages, to enhance linkages and thus economic benefits in the area, and these include:

- a linking water based activities between Cheshunt and the LVWWC, and increasing adrenaline sports offer at the LVWWC;
- b enhancing Waltham Cross to Waltham Abbey link for pedestrians and cyclists;
- c encourage links which support whole family multi-activity trips;
- d strengthen north-south links on a multi-modal Recreation Corridor along the River Lee; and
- e promoting the creation of a Triangle of Events/Activity Opportunities providing cross support for events/facilities at Gunpowder Park, the Showground and Waltham Abbey.

Identification of Activity Zones

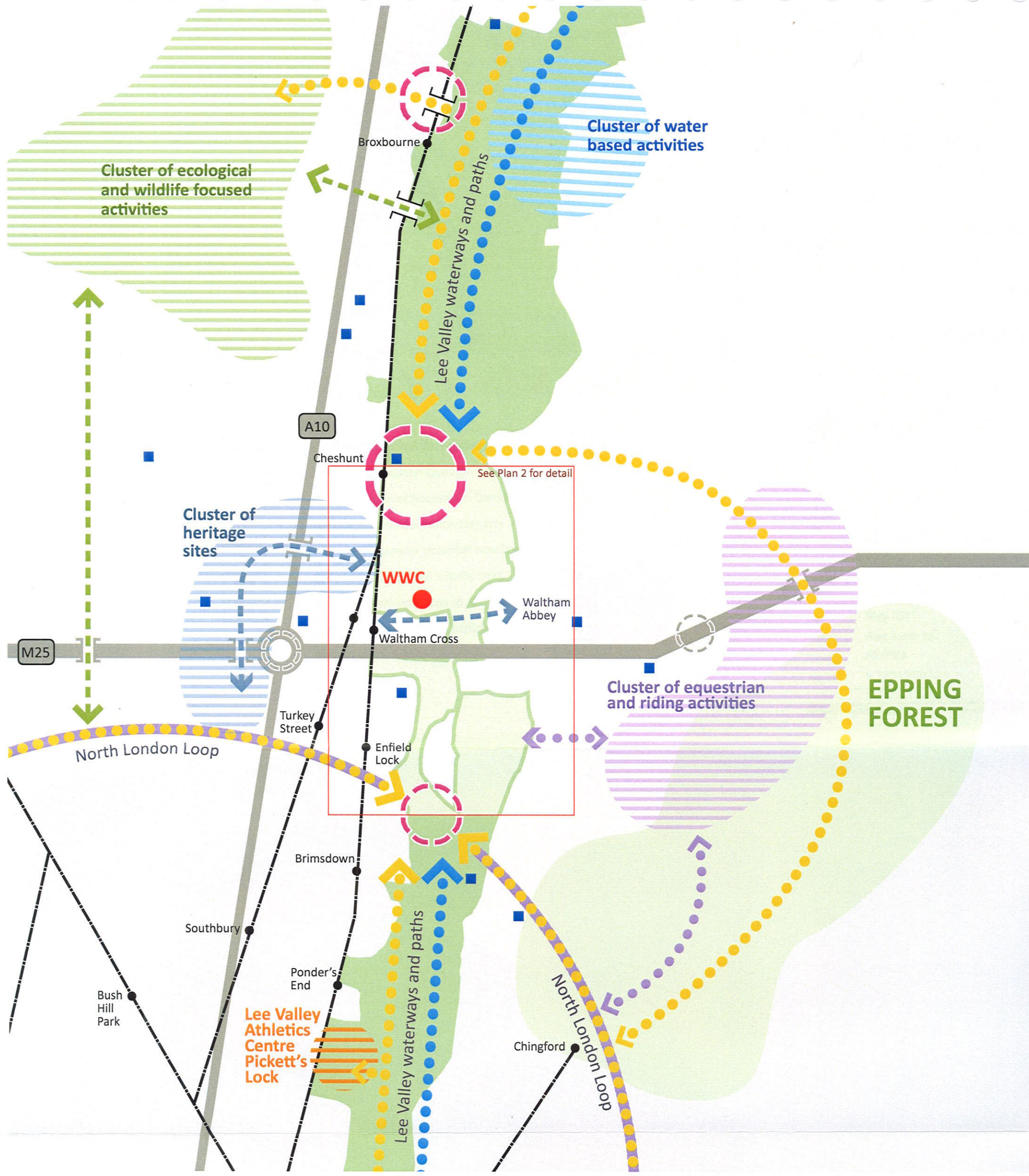
9.7 Following the identification of existing and potential new linkages, a number of Activity Zones have been identified on Spatial Framework Plan 3: Activity Zones. These broad zones are used to define spatially the preferred locations for clusters of activities (both existing and new).

Table 9.1 Activity Zone Characteristics

Zone	Existing Access	Constraints	Character	Preferred Activity Type
A. Adrenaline Sports Activity Zone - Cheshunt	Parking, train (1km) On bus route	Green Belt, Pylons, County Wildlife Site (Part), Flood Zone (2-3)	Flat area with patches of open grass and marsh between tree clusters, areas of shallow water, River Lee	Active outdoor sports, (Indoor facilities south of Highbridge Street)
B. Adrenaline Sports Activity Zone - WWC	Limited parking, Train (<200m)	Green Belt, County Wildlife Site (Part), Flood Zone (2-3), Pylons	Flat area with open grass and low vegetation between tree clusters, River Lee and canal, new WWC	Active outdoor sports
C. Adrenaline Sports Activity Zone - Rammey Marsh	Train (>1km), On bus route, good vehicle access	Flood Zone (2-3) (part)	Flat scrub land adjacent to M25	Motor sport, activities
D. Heritage Activity Zone - Waltham Abbey/ Gunpowder Mills	Parking, train (>1km), On bus route	Heritage Assets, Flood Zone (2-3) (part)	Manicured gardens and heritage buildings within Abbey, Unique gunpowder mills and associated open space, some residential	Heritage/ cultural activities
E. Ecology Activity Zone - Arboretum	Parking, train (>1km)	Green Belt, Flood Zone (2-3) (part)	Planted woodland and trees in formal arrangements	Low environmental impact activities
F. Ecology Activity Zone - Rammey Marsh	Train (>1km), On bus route	AMI, Flood zone (2-3)	Natural marsh land, maintained in parts	Low environmental impact activities
G. Sport/Events Activity Zone - Town Mead	Limited parking, train (>1km)	Flood Zone (2-3)	Man-made sports ground with various grass and surfaced sports pitches	Formal sports facilities (tennis, football etc.)
H. Sport/Events Activity Zone - Gunpowder Park	Parking, On bus route, Train (>1km)	County Wildlife Site (part), Flood Zone (2-3) (part)	Landscape designed country park, areas of historical field enclosure	Temporary outdoor sports

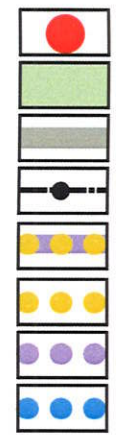
Source: NLP

9.8 The Activity Zones (A-H) are described in Table 9.1 above with a summary of location, existing access and restrictions which may affect potential for new



Key

- White Water Centre
- Lee Valley Park
- Roads
- Rail
- North London Loop
- Cycleways/long distance walks
- Bridleways
- Water based links (River Lee/Canals)



- Exiting routes connecting ecology sites
- Existing routes connecting heritage site
- Gateway from road network
- Lee Valley Regional Park gateways
- Accommodation
- Existing bridges



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Project White Water Centre Study

Title **Spatial Framework Plan 9.1: Existing Strategic Links**

Client Lee Valley Park

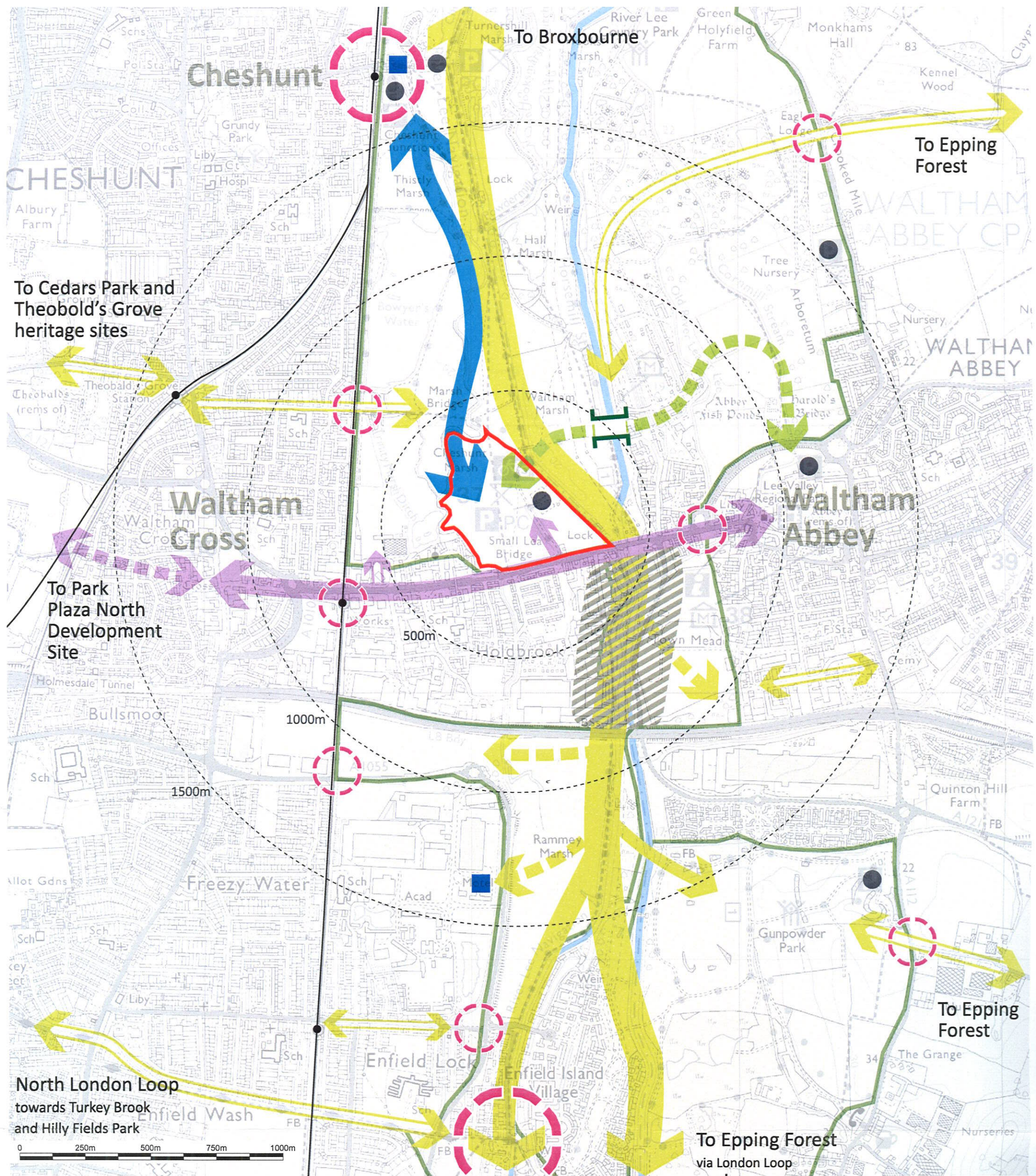
Date May 2011

Scale NTS @ A3

Drawn by AF/PBa

Drg. No IL12545/004b





Key

- | | | | |
|--------------------------|--|---|--|
| White Water Centre | | Lee Valley Regional Park gateway point | |
| River Lee/Navigation | | Enhance Recreation Corridor | |
| Lee Valley Park boundary | | Priority section of Recreation Corridor | |
| Walking distance | | Recreation Corridor secondary link | |
| Rail | | Recreation Corridor potential new link | |
| Parking | | Enhance water based activity links | |
| Accommodation | | Enhance Waltham Cross to Abbey Links | |
| | | Create new whole family activity link | |
| | | Potential new foot/cycle bridge | |

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Project White Water Centre Study

Title **Spatial Framework: Plan 9.2: Local Linkages**

Client Lee Valley Park

Date May 2011

Scale See scale bar

Drawn by AF/PBa

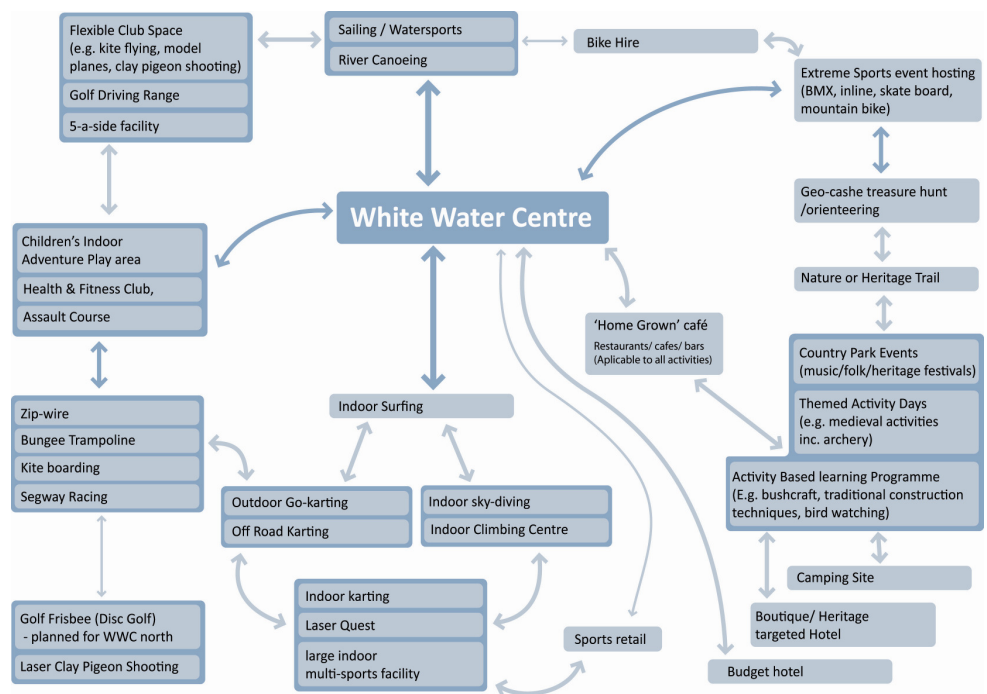
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facilities. Taking these into account, the preferred broad type of activity for each Activity Zone is identified.

Spatial Distribution of Potential New Uses

- 9.9 In order to capture a more rounded representation of the potential variety of activities surrounding the LVWWC, the range of new facility options within the Spatial Framework includes a broader spectrum of leisure activities than solely adrenaline sports.
- 9.10 Figure 9.1 below identifies linkages between different potential activities to provide an indication of how different facilities align themselves to the LVRP brand and where cross-over of activities may be more or less likely. These cross relationships have been used as a background structure to understand where proximity of activities may yield positive benefits for strengthening the overall offer as a wider visitor destination. Additional linkages may be forged in specific cases; however, this diagram provides a general overview of potential cross-relationships based on the project team’s experience and research in this study.

Figure 9.1 Cross Relationship of Activities and Uses



Source: NLP

↔ Links activities whose visitors are more likely to visit the other linked activity while weight of arrow indicates strength of linkage

- 9.11 Table 9.2 sets out the options for new activities and facilities appropriate to each of the different Activity Zones. New activity options are based on the character of the different Activity Zones identified in Table 9.1 and Figure 9.1,

as well as their constraints and access requirements. The potential activities are ordered by preferred Activity Zone and three broad timescale categories:

- Short term (Pre-Olympics in Summer 2012);
- Medium term (Post Olympics but before the Canoe Slalom World Championships in Summer 2015); and
- Long Term (2016 onwards)

9.12

Commentary on how potential new activity options relate to the linkages identified earlier is also provided.

Table 9.2 New Facility Options by Activity Zone and Timescale (Read with Plan IL12545/007)

Preferred Zone	New Activity Options	Facilities Required	Use Restrictions	Access	Linkage Concept
Short Term					
Adrenaline Sports - Cheshunt	Bike Hire, Sailing/ Watersports, River Canoeing, Camping Site	Canoe storage, and camp facilities	Suitable water course, sufficient parking	All modes	Would benefit from improved Recreation Corridor and enhance water sports link
Ecology - Arboretum	Activity Based learning Programme (E.g. bushcraft, traditional construction techniques, bird watching), Geo-cashe treasure hunt/ orienteering, Golf Frisbee, Nature or Heritage Trail	General*	None	All modes, but likely to be predominantly private car due to location	Would offer whole family activities bridging between Ecology, Heritage and Adrenaline Zones
Heritage - Waltham Abbey and GPP	Themed Activity Days(e.g. medieval activities inc. archery)	General*	Crosses over with other activities	All modes, including temporary Lee River boat	Would offer whole family activities programmed through the year
Sport/Event Space	Flexible Club Space (e.g. kite flying, model planes, clay pigeon shooting)	General* club facilities	Various by activity	All modes, but likely to be predominantly private car due to location	Activities on Site 7 would benefit from Recreation Corridor improvements
Medium term					
Sport/Event Space - Town Mead	5-a-side facility	Specialist facility	preferred location on main road	All modes, predominantly private car from M25	Would benefit from improved Station Link & Recreation Corridor and pedestrian access to A121
Adrenaline Sports - WWC	Zip-wire, Assault Course, Bungee Trampoline, Segway Racing, Laser Clay Pigeon Shooting	General* and Course installation	Suitable woodland, or artificial platforms, Flat open space, Storage for Segways	All modes	A range of activities would add to whole family activities offer and ancillary LVWWC offer

Preferred Zone	New Activity Options	Facilities Required	Use Restrictions	Access	Linkage Concept
Sport/Event Space - Gunpowder Park	Golf Driving Range, Kite boarding	Specialist facility	50m x 200m open land for golf, Sufficient flat open space for kite boarding	Predominantly car based	Activities on Site 7 would benefit from Recreation Corridor improvements
Ecology - Arboretum	'Home Grown' café	Specialist facility	Requires farm produce sources	All modes	Would support whole family activities identified for this Zone
Sport/Event Space - Gunpowder Park	Country Park Events (music/folk/heritage festivals)	Specialist temporary facilities	Size of site will vary by event	All modes, Including temporary Lee River boat	Would provide opportunity to promote Recreation Corridor and other local facilities
Long term					
Adrenaline Sports - LVWVC	Restaurants/ cafes/ bars, Sports retail, Budget hotel	Suitable building/s specialist facility	Dependent on private investment and planning permission	All modes	Would benefit from improved Station Link, would enhance Recreation Corridor key linkage
Adrenaline Sports - LVWVC	Health & Fitness Club, Children's Indoor Adventure Play area	Specialist facility	Preferred location will be accessible by car and train	All modes, but predominantly car based	Would benefit from improved Station Link, would support outdoor fitness facilities at LVWVC
Adrenaline Sports - LVWVC	Extreme Sports event hosting (BMX, inline, skate board, mountain bike)	General*, sufficient parking	Size of site will vary by event	All modes, Inc. temporary Lee River boat	Would help establish events uses and WVC
Heritage - Waltham Abbey and GPP	Boutique/ Heritage targeted Hotel	Specialist facility	Dependent on heritage offer	All modes	Would benefit from improved Station Link and Family Activity Days/weekends
Adrenaline Sports - Rammey Marsh	Off Road Karting	General* and Storage location for karts	Sufficient open space (flat or sloped)	All modes, predominantly private car due to good access from M25	Would not link to WVC without improved Recreation Corridor
Adrenaline Sports - LVWVC	Indoor Surfing, indoor sky-diving indoor karting, Indoor Climbing Centre, Laser Quest	Specialist facility	Prominent location visible from road network would be preferable	All modes, sufficient parking	Would benefit from improved Station Link & Recreation Corridor, would benefit from establishing Extreme sports event at Site 2 in the Medium-term
Adrenaline Sports - Rammey Marsh	Outdoor Go-karting or other large indoor sports facility.	Specialist facility	200m x 400m site	Predominantly car based	Would not link to LVWVC without improved Recreation Corridor

Source: NLP

- 9.13 The type of ancillary facilities required to support the potential uses have been considered. Activities which do not require specialist facilities will be more flexible in terms of the time-line for setting them up. Uses requiring large scale specialist facilities such as a go-karting track will have significant lead times to achieve necessary permissions etc. Where 'general' facilities are identified this includes standard facilities such as toilets, changing rooms, café etc.
- 9.14 Access to the activity zones has been established by looking at the location of the zone in relation to existing public and private transport. Where zones are identified as accessible by all modes, this assumes a split of private vehicle and public transport. Sites with poor access may not be suitable for large trip generating uses; however, where a proposed use is related to a linkage concept, the access to the site is considered to have the potential to be improved.
- 9.15 At this strategic level, access arrangements and traffic impacts have not been investigated in detail. This would need to be incorporated into future assessment of site specific proposals as and when they come forward.

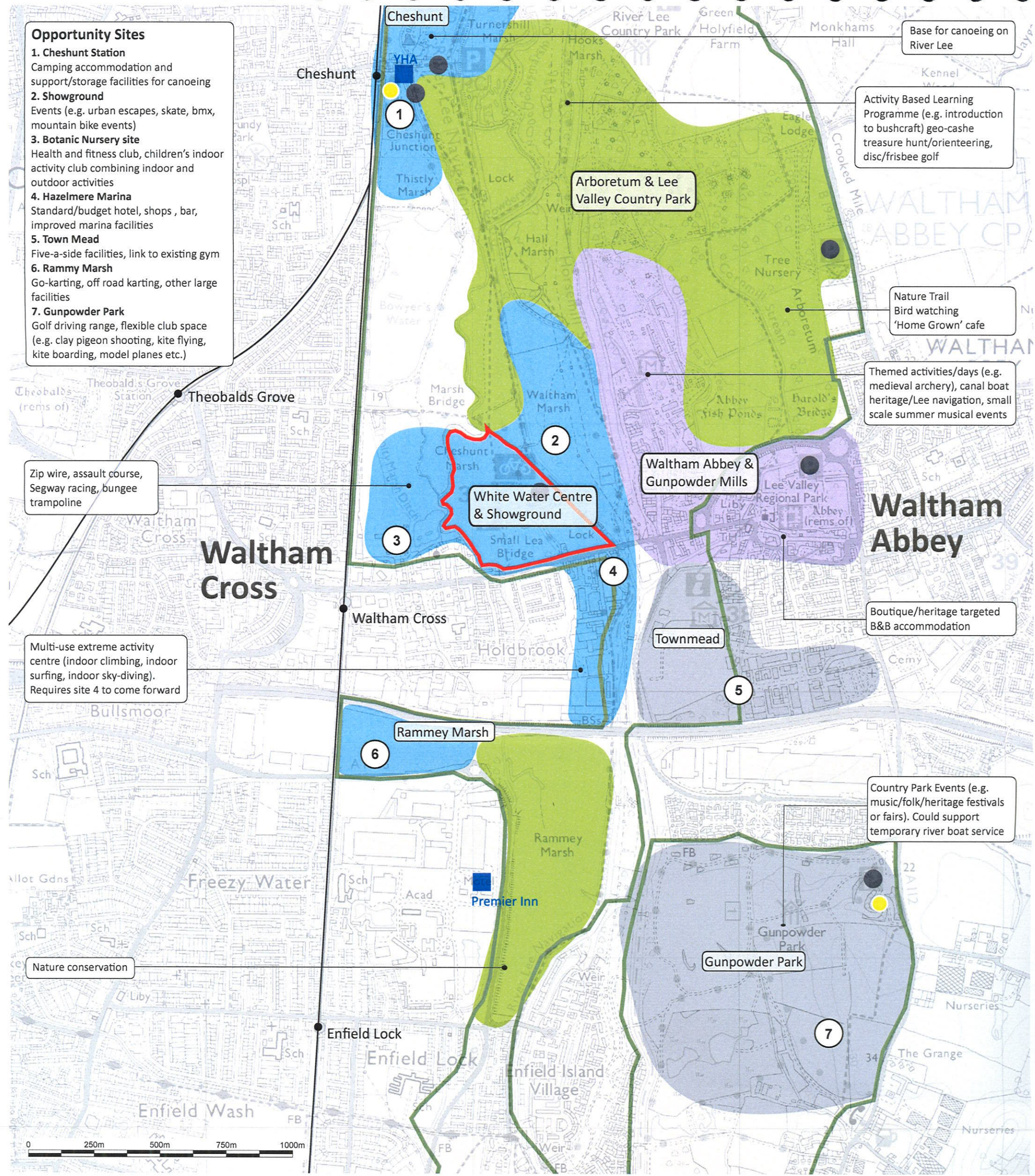
Opportunity Sites

- 9.16 In addition to the uses identified within the Activity Zones, more detailed consideration has been given to the potential uses within seven Opportunity Sites identified by the client group.
- 9.17 The following opportunity sites have been identified on the Spatial Framework (Plan 4).
- Opportunity Site 1: Cheshunt Station Site
 - Opportunity Site 2: Showground Site
 - Opportunity Site 3: Botanic Nursery Site
 - Opportunity Site 4: Hazelmere Marina (including industrial land to south of Hazelmere - site 4b)
 - Opportunity Site 5: Town Mead Sports Ground (including Brooker Road Industrial estate - site 5b)
 - Opportunity Site 6: Rammey Marsh
 - Opportunity Site 7: Gunpowder Park
- 9.18 A brief summary of how these sites could link into the Spatial Framework is provided below.

Opportunity Site 1: Cheshunt Station Site

- 9.19 This site is located within the Adrenaline Sports Zone: Cheshunt, close to the existing YHA and Young Mariners Club. It is also near the starting point for the 2 mile Bowyers Water Trail, the proposed Nature Play trail, and the proposed dog agility course which form part of the River Lee Country Park Development. The

- Opportunity Sites**
- 1. Cheshunt Station**
Camping accommodation and support/storage facilities for canoeing
 - 2. Showground**
Events (e.g. urban escapes, skate, bmx, mountain bike events)
 - 3. Botanic Nursery site**
Health and fitness club, children's indoor activity club combining indoor and outdoor activities
 - 4. Hazelmere Marina**
Standard/budget hotel, shops, bar, improved marina facilities
 - 5. Town Mead**
Five-a-side facilities, link to existing gym
 - 6. Rammy Marsh**
Go-karting, off road karting, other large facilities
 - 7. Gunpowder Park**
Golf driving range, flexible club space (e.g. clay pigeon shooting, kite flying, kite boarding, model planes etc.)



Zip wire, assault course, Segway racing, bungee trampoline

Multi-use extreme activity centre (indoor climbing, indoor surfing, indoor sky-diving). Requires site 4 to come forward

Nature conservation

Base for canoeing on River Lee

Activity Based Learning Programme (e.g. introduction to bushcraft) geo-cashe treasure hunt/orienteering, disc/frisbee golf

Nature Trail
Bird watching
'Home Grown' cafe

Themed activities/days (e.g. medieval archery), canal boat heritage/Lee navigation, small scale summer musical events

Boutique/heritage targeted B&B accommodation

Country Park Events (e.g. music/folk/heritage festivals or fairs). Could support temporary river boat service

Key

- White Water Centre
- Lee Valley Park boundary
- Rail
- Parking
- Accommodation
- Identified Opportunity Site:
 - Cheshunt Station site
 - Showground
 - Botanic Nursery site
 - Hazelmere Marina
 - Town Mead Sports Ground
 - Rammy Marsh
 - Gunpowder Park

- Adrenaline Sports Activity Zone (e.g. zip-wire, zorbing, climbing wall, sailing, white water rafting)
- Heritage Activity Zone (e.g. Gunpowder Mills and Abbey Visitor Centres)
- Ecology Activity Zone (e.g. nature trails, bird-watching, nature education, dog agility, frisbee golf)
- Sport/Event Space Activity (e.g. flexible space for a wide range of activities from football and baseball to open air concerts or temporary accommodation)
- Potential new refreshments locations

nlp Nathaniel Lichfield and Partners

Project	White Water Centre Study
Title	Spatial Framework: Plan 9.3: Opportunity Sites and Potential Uses
Client	Lee Valley Park
Date	May 2011
Scale	See scale bar
Drawn by	AF/PBa
Drg. No	IL12545/003d

site is easily accessible from Cheshunt Station and has a small number of parking spaces.

- 9.20 This site could form a launch point for river canoe trips. Visitors could arrive by train or car hire canoes and paddle downstream past the various attractions and venues in the Lee Valley Park. Visitors would then be picked up at a suitable point and driven back to Cheshunt. A variety of length of trips could be arranged, with the potential for stopping off points at key attractions. The site could also potentially accommodate a small camping facility which would complement the existing YHA during busy/event periods. Canoe storage and general facilities such as toilets, changing, lockers, ticketing, and refreshments, would need to be provided.
- 9.21 As the preferred access route to the LVWWC for the 2012 games is via Cheshunt station, this site has the potential to be seen by large numbers of visitors. It would therefore be beneficial to establish a concept for this site as soon as possible, to allow it to be advertised (if not open) during the Olympic Games period. The site is currently well connected by train, and new signage and a park 'gateway' could be established at Cheshunt Station. Walking routes and cycling routes from within the Lee Valley Park exist but could be strengthened with new signage.

Opportunity Site 2: Showground Site

- 9.22 This site is located in the Adrenaline Sports Zone: LVWWC. It lies to the north east of the LVWWC site but separated from it by the River Lee Navigation, with the Gunpowder Mills site to the east. There is footpath access from the LVWWC and the proposed Natural Play Trail to the north of the LVWWC in the Lee Valley Country Park. This footpath also connects to the residential area of Waltham Cross (Royal Avenue). The main pedestrian and vehicle access is from the southern tip of the site on Highbridge Street (approximately 1km from Waltham Cross Station).
- 9.23 Currently used as a showground, the site therefore provides a flexible venue for various activities through the year. Constraints on the site include electricity pylons, flooding and Green Belt designation which limit the range of possible uses. However, given the site's proximity to the LVWWC its role as an outdoor event space could continue and enhanced, especially for adrenaline sports related events (e.g. BMX, Inline skating, skateboarding, mountain biking). Events could include some element of sports displays and competition and could potentially cover a number of sports depending on demand.
- 9.24 Due to the impending Olympics (2012) and the subsequent World Championships (2015), scheduling of a significant adrenaline sports related event on this site would be best placed to follow on from the World Championships. Scheduling should aim to achieve a rolling programme of events which can be advertised well in advance to publicise the site and benefit from any cross over in interest from one event to the next. In order to achieve this, organising and event arrangements/permissions would need to be sought well in advance. These events would require temporary facilities on the site,

including all specialist features (ramps, courses etc) and ancillary facilities such as catering, changing, toilets.

- 9.25 The experience of Olympics visitors coming to the LVWWC in 2012, should provide evidence on the adequacy of public transport access to the site. A strategy of directing visitors to Cheshunt Station could be applied, as in the Olympics. However, improvements to the pedestrian access on Highbridge Street (as identified in the linkages concepts) would be beneficial. Similarly, providing a new connection to the site from the east over the Horsemill Stream would enhance the connectivity of the site to Waltham Abbey via the Gunpowder Mills and wider public footpath network.

Opportunity Site 3: Botanic Nursery Site

- 9.26 This site is also located in the Adrenaline Sports Activity Zone: WWC. The site is however located on the south western corner of the zone. The site is within the green Belt, although it has a substantial existing footprint (approximately 6000sqm) albeit only single storey. The site is located just north of Eleanor Cross Road (100m). It is approximately 200m from Waltham Cross train station. From the north the site can be access from public footpaths within the Lee Valley Park, and from the northern area of Waltham Cross via a pedestrian level crossing at Trinity Lane.
- 9.27 This site's location in relation to Waltham Cross station and the residential area of Waltham Cross warrants a facility which will serve the local population as well as visitors from further afield using the LVWWC. A health & fitness club could attract local users and potentially could also provide training/physiotherapy/complementary facilities to the LVWWC athletes. The site's location adjacent to the open park means that indoor gym training could also be supplemented with outdoor facilities such as an assault course. An indoor children's adventure play area could also create positive links with the Lee Valley Country Park development, providing an indoor alternative to the natural play trail in poor weather.
- 9.28 A health & fitness centre and children's indoor play would require a specialist building on the site. The design of the building would also need to seek to minimise impact on the Green Belt. As this site is within the Green Belt, any application for replacement of existing volume of buildings would need to meet Green Belt tests. It is considered that proposals for such new activity could be brought forward in the medium term.
- 9.29 Pedestrian access to the site from Waltham Cross Station could be significantly enhanced through improvements to Eleanor Cross Road, through traffic calming and provision of additional crossing points. Footpath links to the residential area of Waltham Cross could also be improved, connecting to the level crossing at Trinity Lane and on to Theobald's Grove Station. Suitable private car parking provision would also need to be provided.

Opportunity Site 4: Hazelmere Marina

- 9.30 This site is located within the Adrenaline Sports Activity Zone, south of Highbridge Street, and within the area identified as a critical link on the River Lee Recreation Corridor. It lies adjacent to the River Lee and currently comprises a small marina and café, with an industrial estate to the west and south of the marina. Access is from Highbridge Street, and it lies approximately 1km from Waltham Cross train station, with bus services along Highbridge Street connecting the site to the train station. There is a small amount of parking currently on the site.
- 9.31 This site is in an important location between Waltham Cross and Waltham Abbey, close to the LVWWC and on a critical pinch point in the Lee Valley Park. Investment and redevelopment of this site would therefore have potentially significant benefits for the area and wider Park. Potential uses for this site are set out in Broxbourne's 'Hazelmere Marina Development Brief' and primarily comprise the replacement/improvement of the marina, retail and restaurants, hotels and residential uses.
- 9.32 The site would need to be wholly redeveloped to create a new marina and to accommodate restaurants, shops and bars. It is understood that the site is unlikely to be developed in the short term and as yet no planning application has been submitted. Accordingly, this site has been identified in the medium term category for development. Increased visitor numbers as a result of the LVWWC and any subsequent activity generating uses could improve the viability of any retail or restaurant development on this site.
- 9.33 Improvements to the pedestrian access along Eleanor Cross Road/Highbridge Street would link the site to both Waltham Cross and Waltham Abbey and significantly improve connectivity. Proximity to the entrance to the LVWWC and the Showground site could also be strengthened by the proposed development on this site.
- 9.34 In addition to the Hazelmere Marina site, the area of land to the south which also lies on the River Lee (Site 4b) has potential to allow an extension of the marina site. In the long term, new development of Adrenaline Sports activities (indoor surfing, indoor skydiving, indoor climbing, or even indoor karting) could improve the industrial estate's contribution to the setting of the River Lee. Development would be encouraged to provide an active and positive relationship with the River Lee between Highbridge Street and the M25 in order to create substantial benefits improvements to the actual and perceived connectivity between Rammey Marsh/Gunpowder Park and activity sites to the north (including the LVWWC).

Opportunity Site 5

- 9.35 This site is within the Sport/Event Space Activity Zone: Town Mead. The opportunity site forms an undefined area within the existing sports ground which could be used to improve facilities and activities offered on the Waltham Abbey side of the River Lee. Existing access to the site is via Orchard Gardens,

a residential side road. Access to the sports ground in general and the site are not very legible from the main pedestrian and vehicle routes through Waltham Abbey. There is an informal pedestrian access into Townmead leisure park from the A121 through the existing boundary planting.

- 9.36 In terms of potential uses for this site, the sports offer at Town Mead could be enhanced through the provision of more formal 5-a-side football pitches. A proposed golf driving range on this site was recently rejected due to impact on trees and this use might be better suited to a larger site, for example land to the south of Gunpowder Park.
- 9.37 The development of a specialist 5-a-side facility at Town Mead could be brought forward in the medium term (2012-2015). Such a facility could include 6-8 pitches with a club house and bar area to attract both the local and slightly wider visitor catchment (Goals currently operates a nationwide chain of such facilities which can be used for reference).
- 9.38 Development of new facilities at Town Mead would be conspicuous from the M25 and therefore would have a visual presence for motorists. To support this, signage and directions from the M25 would be required. In addition, to achieve cross benefits between development of the Hazelmere Marina and Town Mead sites, greater visual links between the two sides of the River Lee could be forged. A long term aspiration for a pedestrian bridge could also be considered.
- 9.39 In addition to additional facilities within Town Mead, it has also been identified by Epping Forest Council that part of the Brooker Road industrial estate (site 5b) could come forward for redevelopment as retail and replacement commercial and industrial uses. Were this to be the case, there would be a opportunity to create a strong direct link from Sewardstone Road (the main north-south route into Waltham Abbey) and Town Mead. A proposal which included new facilities along with a realignment of the road to the site adjacent to the cemetery, improvements to the public realm and a landmark building visible from Sewardstone Road at the gateway to the leisure park, would significantly enhance the connectivity of Townmead to the residential area of Waltham Abbey (via the footpath adjacent to Cobbin's Brook).

Opportunity Site 6: Rammey Marsh

- 9.40 The Rammey Marsh site is identified as a separate Adrenaline Sports Activity Zone. It is bounded to the north by the M25 and to the west by the railway line. To the south is the Innova Park industrial/distribution estate. To the east is the wider area of Rammey marsh which is designated as an Area of Metropolitan Importance. The site is within the Green Belt and partly within Flood Zone 3. Access is off the A1055 which serves the industrial estate and connects to the M25 at Junction 25. There are informal footpaths across the wider Rammey Marsh area linking to the Lee Valley Path to the east of the site. The site is poorly located in respect of pedestrian access to Waltham Cross train station, although there is a bus service which connects to the station.

- 9.41 Although the site is currently under used, Green Belt and flood risk factors could restrict some potential uses. The size of the site could accommodate some form of motorised sporting activity, such as off road karting or more formal outdoor go-karting. Any development would require justification in relation to potential effects on Green Belt. Specific facilities would be required for development of motor sport activities on this site, such as an ancillary club house and bar facilities.
- 9.42 Due to the location of the Rammey Marsh site, separated from the LVWWC by the M25, it is likely that any potential links between activities on the two sites would be limited to walking and cycling. Links would be dependent on forming an attractive route from the Rammey Marsh site to the Lee Valley Tow Path and providing appropriate signage and distance marking. The potential of this link would also be dependent on enhancing the critical section of the River Lee between Highbridge Street and the M25. Overall, however, providing there is demand, the nature of potential activities on the Rammey Marsh mean that it is most likely to come forward independently of development on the LVWWC site.
- 9.43 The majority of visitors to the site are likely to be by car but some may arrive via bus from Waltham Cross station and direct footpath links to the Lee Valley Path could be created through the Rammey Marsh to the east of the site.

Opportunity Site 7

- 9.44 This site comprises open land to the south and east of Gunpowder Park and entirely within the Green Belt with access from Sewardstone Road to the east.
- 9.45 This large area of open fields (approximately 600m by 500m) is not currently used for any recreational activity. The landscaped area of Gunpowder Park to the north and west when added to this site forms a very large, flexible open area which could be used for a wide range of activities which do not conflict with Green Belt policy. The site would be ideally suited to a range of flexible club space for activities which require open space but which also benefit from being in proximity to the urban area of London for their membership (for example, kite flying clubs, model planes, clay pigeon shooting). In addition, and potentially related in to such club use, the site could be marketed for larger outdoor events (e.g. those beyond the capacity of the Showground site).
- 9.46 Flexible club activities could be promoted on the site immediately and whilst not specifically related to the LVWWC, this would support the branding of this area as an active leisure destination. Large scale events, similar to the opportunities for the Showground site, would need to be planned well in advance in order to secure a well spaced, rolling programme of events. Club use of the site would require basic facilities (toilets etc) while a refreshment offer could also be added in the medium to long term based on demand.
- 9.47 Access to this site is likely to be predominately private car based, but it is on a bus route. Improvement to the critical link on the multi-modal River Lee Recreation Corridor would assist in connecting this site up with the wider offer in this part of the Lee Valley. In addition there is potential to promote more

strategic links for both mountain bikes and riding from the Lee Valley Path, through this site via Avey Lane to Epping Forest.

Strengthening Linkages

9.48

The following measures have been identified for enhancing and encouraging better use of links so as to support the Spatial Framework:

- 1 **Link between Cheshunt and LVWWC already proposed as part of the Lee Valley Country Park development:** Consider continued use of this link by large number of visitors to the LVWWC during events, along with enhancement of overall capacity of the route and providing facilities such as bins, benches, and lighting. This would support activities on Opportunity Site 1.
- 2 **East West Link - Highways improvements and public realm investment:** Consider future extension beyond Waltham Cross town centre to the Park Plaza North site. This investment would support Opportunity Sites 3, 4 and 5.
- 3 **Longer distance links on the Recreation Corridor:** This important strategic link is already established by the River Lee Navigation and towpath. Gateways onto this route, at Broxbourne, Cheshunt, and Enfield Island Village (where it meets the North London Loop) should be enhanced with signage identifying opportunities for walking and cycling to activities within the Lee Valley Park. These gateways could also provide opportunities for promotion of activities and facilities within the surrounding area for visitors arriving from the Lee Valley Park. A review of the quality and usability of this route could identify areas where investment may be required, potentially including footpath improvement, public art and other interventions targeted on the critical link between Highbridge Street and the M25. This would aim to draw residents of Enfield through this link to the LVWWC site and other facilities. This measure will also establish stronger connections with Opportunity Sites at Rammey Marsh (6) and Gunpowder Park (7).
- 4 **Heritage offer links between Waltham Abbey and Myddleton House:** Measures could include advertisements and improvements to the walking route from Myddleton House to Waltham Abbey forming a loop through the LVWWC and Arboretum and back along the east-west link. This route could be surveyed for ease of navigation/legibility and additional signage may be required. The route would benefit from a more accessible access between the Showground Site and the Gun Powder Mills (identified by green arrow on Plan 2). A feature footbridge is an option for significantly enhancing connections between these important sites, and strengthening the heritage trail options and would support uses on the Showground (Opportunity Site 2).
- 5 **Potential to link longer distance cycle route from Chigwell station through Epping Forest, over M25 and back along the Recreation Corridor and the north London Loop:** Consider promotion of this route

using maps and leaflets, perhaps provided at Chigwell station, which is a common point for cyclists to meet before riding in Epping Forest.

- 6 **Avery Lane from Epping Forest to Gunpowder Park connecting with the Recreation Corridor:** Investigate requirements for riding access along Avery Lane from Epping Forest to Gunpowder Park connecting with the Recreation Corridor. Specific interventions may be required to facilitate routes as bridleways which would need to be developed in consultation with the riding schools in Epping Forest.
- 7 **Link through Brooker Road to the Townmead sports ground and on to the Lee Valley/Hazelmere marina:** Explore potential for a long term new access to the sports ground from A121 and over the river to the Marina.
- 8 **Stronger footpath links from the Premier Inn to the Lee Valley Multi-Recreation Corridor:** These could be created to encourage walking and cycling for hotel guests.
- 9 **Ordnance Road and Trinity Lane:** Secondary connections to the Lee Valley Park could be enhanced using signage. A survey could be undertaken to assess the quality of these existing routes.

9.49 The above list provides measures which could be undertaken through a number of means including marketing and physical works. This list is not exhaustive of measures which could support the Spatial Framework and the long term growth of this area as a leisure destination but it does provide a basis upon which more detailed proposals can come forward for specific sites.

Conclusions

9.50 The Spatial Framework identifies and maps the wide range of opportunities available within the Lee Valley Park and its immediate surrounds in the vicinity of the new LVWWC. The Activity Zones identified provide a broad structure for considering how connections between new and existing facilities can be strengthened to achieve the maximum benefit from investment within this part of the Lee Valley Regional Park. The preferred use options shown on Plan 3 have been identified using both the strategy and local linkage concepts and can be used to guide decisions for targeting proposals to enhance the Lee Valley Regional Park visitor experience.

9.51 The Spatial Framework also provides a structure for bringing forward the seven Opportunity Sites. The Spatial Strategy ensures that any detailed proposals for these sites will be based on linkage concepts which support the wider Lee Valley Regional Park. Prior to establishing more detailed proposals, the Opportunity Sites will need to be reviewed against potential risks to development identified by the relevant local planning authorities and the Lee Valley Regional Park Authority. However, at this stage, no single Opportunity Site stands out as a preferred option for taking forward first or as a priority for development for a specific use with each offering different opportunities for adding to the area's leisure destination offer.

10.0 Strategies and Interventions

- 10.1 This section reviews the effectiveness of current economic development and tourism strategy approaches in supporting potential growth opportunities associated with the LVWWC. Where appropriate, alternative approaches to help bring forward new development and maximise local benefits are indicated, including key elements of any marketing/branding strategy and actions to improve local procurement.
- 10.2 In addition, it considers the need for intervention to bring forward some potential projects that could produce beneficial impacts, where market factors mean that private sector delivery is less likely. It would also consider whether the benefits of some developments could be enhanced by intervention, to bring them forward earlier or produce a greater level of economic activity. Finally, a proposed timeline for interventions and development is proposed.

Current Tourism Strategies

- 10.3 East of England Tourism has an overall vision to be the 'region of choice for the discerning visitor' but does not appear to have a tourism strategy. Its Business Plan 2009/10 sets out priorities such as attracting new visitors to the region, marketing iconic themes and building on the London 2012 Olympics but few specific actions to deliver these.
- 10.4 The Essex Tourism Growth Strategy identifies three main products as key to the development of Essex's tourism industry and sectors for future promotion: Cultural tourism; Business tourism (particularly smaller meetings and conferences); and Activity and Special Interest tourism (including cycling, walking, sailing and antique-hunting etc). The strategy sets out its aims to grow tourism by making Essex: an area where people visit rather than simply pass through; a destination of choice for short breaks by people resident in London and the South East; known for its cultural offering, activity and special interest tourism. Whilst the strategy says that to progress these aims the focus should be on marketing, it also recognises that the quality of attractions will need to be improved.
- 10.5 Hertfordshire has no specific tourism strategy, with some tourism issues dealt with in the County's Economic Strategy. This aims to increase the value of tourism in the local economy and increase employment in the 'accommodation and food service' sector, largely by:
- a maximising tourism and cultural opportunities from the 2012 Olympic Games to attract and retain high calibre staff and dynamic enterprises;
 - b supporting the tourism & leisure sector in raising the quality of their offer and provide high quality marketing material to promote Hertfordshire as a visitor destination, especially for short breaks;
 - c providing training for the tourism, leisure & hospitality sector to retain staff, increase skills and enhance the visitor experience.

- 10.6 Neither Broxbourne nor Epping Forest Councils appear to have a specific tourism strategy. The emerging Broxbourne Core Strategy aims to develop policies on leisure and recreation along these lines:
- a major leisure facilities to be developed in the Lee Valley working in partnership with the Lee Valley Regional Park Authority, British Waterways, the Olympic Delivery Authority (ODA) and the London Organising Committee of the Olympic Games (LOCOG);
 - b leisure facilities of local significance to be developed in partnership with prospective developers at Greater Brookfield and Cheshunt Football Club;
 - c supporting opportunities for quiet, informal countryside recreation;
 - d increasing links through and along the Lee Valley, as part of the need to develop an increased green infrastructure resource;
 - e ensuring that any new facilities are well located with regard to other services and facilities and served by public transport;
 - f developing opportunities for increased leisure and recreational opportunities, appropriate to the aims of the Lee Valley Regional Park, designations for nature conservation importance, the importance of landscape conservation and locations within the Green Belt.
- 10.7 Epping Forest District has no Core Strategy as yet. Policies on leisure and tourism in its 2008 Local Plan Alterations include:
- a general support for development of additional recreational, sporting and tourist facilities which are in the best interests of the local community and unlikely to harm the character of the surrounding area (Policy RST1);
 - b general support for outdoor leisure uses within the Lee Valley Regional Park which have no significant adverse impact on its character or function (Policy RST23);
 - c developments within or adjacent to the Lee Valley Regional Park to have regard to the importance of the Park for leisure, recreation and nature conservation; make provision for improved public access and landscaping, safeguard the amenity and future development of the Park; and conserve and, where possible, enhance the landscape of the Park or its setting (Policy RST24).
- 10.8 From this, the main focus of current tourism policies is on supporting development of outdoor recreation uses within the Lee Valley Park as well as maximising the benefits from the Olympics, raising the quality of the tourism offer and improving skill training for the leisure sector. However, there appears to be no detailed strategy to deliver these aims or market the area as a visitor destination.

Future Planning/Tourism Strategies

- 10.9 Given the issues identified by this study and the importance of making it easier to attract and bring forward leisure development in this location which has a

number of constraints, the following types of approaches could be considered within local development plan documents:

- a designating the LVWWC site and the land around it as an area to be covered by an Area Action Plan within the Local Development Framework process;
- b designating the LVWWC site and appropriate adjoining land as an area to which a Local Development Order could apply, with a relaxation of planning restrictions for certain types of leisure development;
- c consider whether the Green Belt boundaries should be amended in this location, or the site designated as an Major Developed Site in the Green Belt, in order to facilitate future leisure development;
- d policies in the local development plan which support leisure development in this location, subject to appropriate criteria.

10.10 In terms of tourism strategies, the following type of policies would be helpful:

- a general encouragement for leisure/sport-related development in this location where it would enhance the LVWWC, fit with the brand for the area and help it develop as a wider visitor destination.

Need for Intervention

10.11 It appears likely that if no intervention were to be taken by the Park Authority or its partners then little would be developed around the LVWWC, and it would fail to develop into the wider visitor destination envisaged for the site. This indicates that at the very least, some actions and leadership on development will be required by the partners to deliver additional facilities. This could be as minimal as advertising an opportunity to the private sector. However, this is likely to vary significantly according to the economic and market feasibility of developing such a facility.

10.12 There will be some uses, probably those requiring significant capital investment and larger numbers of visitors, which the market may be less willing to invest in, particularly in an untried location. In such cases, there may be a case for some form of public sector intervention if it is desirable in terms of economic benefits to bring this facility forward. There are various intervention approaches which could be used to deliver these new leisure facilities in the area around the LVWWC:

Promote to the Market

10.13 Some uses are likely to be delivered by the market if the Park Authority brought potential opportunities to developers/operators, perhaps in the form of an investment prospectus, or potentially some form of masterplan for the site. The developer/operator would of course undertake its own market assessment, but a masterplan which shows an ambition to create an adventure destination would likely generate interest.

Development by Park Authority

- 10.14 Other uses/facilities could be developed by the Park Authority itself. These are more likely to be open-air, recreational facilities within the Park and requiring more limited levels of investment, for example aerial ropes, outdoor climbing walls.

Private Development Partner

- 10.15 Some uses/facilities could be developed by the Park Authority with a private sector development partner. These are more likely to be facilities within the Park that require greater levels of investment and/or specialist operator expertise. This approach would have advantages of reducing costs and risks to the Park Authority but would probably give the Park Authority less control and investment return.

Intervention Actions

- 10.16 For those uses that the market may not be willing to take the risk of development, at least in the short term, several forms of intervention are possible:
- a for some of the uses identified, minimum intervention may be needed. Leisure developers/operators will identify an opportunity, or respond to an opportunity promoted to them, and bring forward the facility by themselves. The intervention may only be the scoping of a masterplan which identifies what types of facilities might be developed within the area supported by a degree of market information such as population statistics and park visitor numbers.
 - b at one level, the Park Authority (and/or local authorities) could provide a site with outline planning permission and install essential services/infrastructure to make the development more attractive to the market and reduce risk. The advantage of this would be greater certainty for the operator but it would clearly involve large costs to the landowner;
 - c at another level, public sector funding could be sought to install infrastructure to the site and potentially fund some of the new facilities; this appears less likely in the current economic climate;
 - d the Park Authority or other landowner could reduce the developer's risk by agreeing to a share of profits rather than charging for the land costs or rent; this would potentially result in less financial return for the landowner.
 - e the Park Authority (and/or local authorities) could also provide initial subsidies to the operation of some desirable activities within the Park, to help reduce operator risk and make it more likely that the facilities would be developed; this option could clearly involve on-going short/medium term costs to the landowner.
 - f The park authority could install some (less commercial) additional facilities which would demonstrate a commitment to the masterplan and give confidence that the development of the site will continue.

10.17 The likely levels and types of intervention which may be required to deliver the potential uses identified in Section 8 are shown below in Table 10.1.

Table 10.1 Potential Intervention Requirements

	Potential Intervention Required
Archery	Unlikely to be significant operator interest. Likely to require direct development by public sector although capital requirement would be small
Zorbing/Hydro Zorbing	
Bungee Trampoline	
Golf Frisbee	
Aerial Ropes Course	May be some modest operator interest, although would potentially require development of facility and/or subsidy in order to be realised
Zip-wire	
Outdoor Climbing Wall	
Laser Clay Pigeon Shooting	
Children's Indoor Play area	
Indoor Climbing Centre	
Laser Quest	
Sailing/Watersports	Likely to be reasonable operator interest and given modest capital requirements, could potentially be realised merely by defining opportunity and marketing to the industry
Golf Driving Range	
Paintballing	
Bike Hire	
Indoor Surfing	Some operator interest, although given large capital requirements, may require significant intervention such as joint ventures and/or direct construction of facilities before they would be viable
Go-karting/Indoor Karting	
Restaurants/cafes	Potentially significant operator interest once visitor number have increased, although would potentially require land to be identified and planning permission obtained prior to marketing
Budget Hotel	
Health & Fitness Club	
Other large indoor sports facility	Some operator interest, although given very large capital requirements, may need significant subsidy and/or other financial incentives

Source: NLP/ Tourism UK Analysis

Interventions to Maximise Economic Benefits

10.18 In addition to interventions designed to deliver the construction and operation of additional facilities, some interventions could be used to enhance and maximise the economic benefits of these facilities to the local economy. These would broadly fall under two categories - those designed to maximise visitor spend in the local area, and those designed to ensure that local people benefit from the enhanced range of employment opportunities. Employment issues and interventions have been dealt with in chapter 8, but options for maximising visitor spend could include:

- a ensuring that branding/marketing exercises include local businesses in order to make visitors aware of other attractions and facilities;

- b ensuring that visitor ‘bundles’ are offered on the LVWWC site and within facilities to incentivise and advertise other local attractions/activities;
- c improve pedestrian links between the centre and Waltham Abbey town centre in order to encourage visitors to visit the town; and
- d setting up a local forum for discussion on initiatives to maximise the benefits of the white water centre and further develop its role as a visitor destination - this could include representatives of various local authorities, local businesses and the white water centre management.

Brand/Marketing Strategy

10.19 In addition, to develop the LVWWC site and its immediate surroundings into an attractive location for investment initially, and ultimately a major visitor destination for adrenaline-type activities, it will be essential to prepare an appropriate marketing/branding strategy. Key elements of this strategy would involve:

- a a brand strategy which sets out how the site and other related activities will relate to the market and also identifies how the site will fit within the overall brand of the Park;
- b a marketing strategy which identifies specific target markets, communication channels and the roles and responsibilities of the Park Authority and its partners.

Brand Strategy

10.20 A brand strategy is not simply a logo and a strap line. The brand is made up of a number of aspects including the nature of the experience, the way it is delivered, the way it is perceived by others (brand image) and the way it is communicated to the market (brand identity).

10.21 A brand strategy will do a number of things; it will differentiate the product from other offers, it will represent a promise and it will evoke emotions within users and potential users of the site.

10.22 The Lee Valley Park Authority has recently commissioned consultants to design a new logo for the park as a whole (“LV: For nature, sport and discovery”). However, given the range of other major destinations within the park (including the Olympic Park), this is unlikely to generate the required level of profile for the area around the LVWWC specifically. In addition, the LVWWC itself has developed its own individual brand - “Go Whitewater”. This brand could be less effective at advertising the much wider variety of facilities and events which are likely to be developed around the centre.

10.23 Over the medium term as new activities are developed, the existing brands should be extended or adjusted to provide a clear message for the area around the LVWWC. By then, the “Go Whitewater” brand could be too focused on water activities specific, while the Lee Valley brand may not be specific enough.

However, any new or extended brand will clearly have to be closely related to both the existing brands.

- 10.24 Any new or extended brand for the Lee Valley Park will need to focus on the unique attributes of the area, which is likely to be its range of adrenaline sport facilities, and the wider range of existing attractions in the area. However, there is a risk that a brand which is too focussed on ‘adrenaline’ could deter some users and restrict the market appeal of the site. At the same time, a brand identity that portrays the site as too tame might fail to generate resonance within the target markets.
- 10.25 A brand strategy will therefore be required which sets a balanced tone of excitement and accessibility, a destination site which can thrill and excite the user but which is also accessible to younger audiences and family groups. In addition the brand communications will need to differentiate this offer from other competing destinations.
- 10.26 The brand will represent a collection of outdoor and indoor activities, some will be unique to the area and some (e.g. LVWWC) will be recognised as the market leaders. Many of the activities will have a connection to the countryside in which they are located and all will offer a quality experience. The management of the experience across a number of different operators will be challenging but will be important if the brand is to be successful.
- 10.27 It is also recognised that this ‘adventure park’ branding needs to sit within the larger brand that is the Lee Valley Regional Park. While this established brand already brings together the outdoors and sports, it has a central focus which is environmentally sensitive. Care will be required therefore to ensure that any new sub-brand strategy sits comfortably within the wider Lee Valley Regional Park brand. It could, for example, add a fourth “adventure” theme to the “LV: For nature, sport and discovery” brand identity.
- 10.28 Once the brand is identified and the values ascertained, then a brand identity can be developed. This should be used to distinguish the site as a leisure destination focussed around a range of activities. The brand identity can also be used to create a relevant retail offer. This offer may be available through an outlet within the site and online.
- 10.29 The retail range should be developed to reflect the brand values of the new adventure/leisure cluster and aim to differentiate the offer from other high street retailers. In this way, it will develop more destination pull locally and not just rely primarily on converting those who come into the park for another purpose.

Marketing Strategy

- 10.30 Once the brand strategy has been developed, a communications strategy will be required which targets specific audiences. Specific marketing objectives for the site will be set, including to:
- a position the site as an exciting and invigorating indoor and outdoor experience;

- b create a visitor experience which has strong local market appeal and is also recognised nationally and (in specialist markets) internationally;
 - c ensure that visitors' needs and expectations lie at the heart of the new experience;
 - d increase visitor numbers to this part of the Park, increasing dwell time and generating spend;
 - e develop commercial revenue and private income to support the ongoing marketing, interpretation and development of the site.
- 10.31 A key aim of the marketing strategy must be to change perceptions of the area, for both visitors and leisure operators, and promote the image of an exciting, dynamic visitor destination - the adrenaline sports centre for London. This will be a vital element of making the area around the LVWWC attractive to further leisure facilities and to services that feed off visitors, as well as to building up the critical mass of visitors.
- 10.32 The communications strategy will target the following audiences:
- locals
 - day visitors
 - tourists
 - corporate
 - intermediaries (destination marketing agencies and activity holiday organisers)
 - group travel companies.
- 10.33 The communications plan will set out the messages that will be used to attract these markets, when campaigns will be delivered and which channels of communication will be used.
- 10.34 A key opportunity to promote the site will be before, during and immediately after the Olympic games. During the games, for example, marketing may emphasise that the LVWWC is one of a number of developments planned for the site. During and immediately after the games, a campaign aimed at specialist canoeing groups may focus on 'compare your skills to the world's best'.
- 10.35 The marketing plans for the LVWWC and for the wider site must be integrated to ensure that the correct messages are being communicated throughout this unique period of time.
- 10.36 An element of the marketing plan will also include a need for communications with potential developers and the park users during and before development. It is recommended that once the opportunity is defined and a masterplan scoped a communications strategy is developed which communicates the plan with potential developers and existing park users. Such a communications plan will include the development of a prospectus for developers. This prospectus should

include details of the proposed development plan, market information (population catchments, and park users), information on site infrastructure and local transport links, information on the LVWWC capital investment and profile, details of planning consents gained etc.

- 10.37 Given the proximity of the 2012 Olympics and the time that it might take to develop additional facilities on the site, there is a risk that promotion during the Olympic Games focuses on the LVWWC only. An early win would be to identify activities that can be put in place quickly or are already in place elsewhere and could be included as part of the ‘adventure park’ experience. These activities can then be presented under the new brand during the unique promotional opportunity that the Olympic Games will offer.

Lessons in Implementation

- 10.38 It is useful to look at some examples of successful visitor attractions/leisure complexes which have been developed over time from a single facility or concept. This can indicate the level of development that can be achieved and the approaches used to do this.
- 10.39 **Thorpe Park** theme park in Surrey has some similarities to the LVWWC in having a Green Belt location near the M25 and the outer edge of London and also having begun as a mainly water based attraction. It also differs from the LVWWC site in that its development has been brought forward by private sector owners and leisure operators. Full details are provided in Appendix 3 but some key points of relevance are:
- a a substantial leisure development has been achieved within what was originally a Green Belt site with flood risk issues near the M25 motorway;
 - b a modest water based attraction has been expanded over time into a diversified family oriented visitor attraction with elements aimed at reducing seasonality;
 - c visitor numbers have been increased from 300,000 to almost 1.9 million by gradually adding more “adrenaline type” attractions and continually refreshing the original leisure offer along with active marketing;
 - d this site has gradually been built up to a significant employment centre, with in the order of 1,100 employees, over 900 of which are seasonal workers;
 - e a key factor in building up this attraction was establishing the site as a Major Developed Site within the Green Belt, in parallel with a continuing process of achieving planning permission for, and developing new leisure facilities within this framework, that added to the range of attractions and built up visitor numbers;
 - f agreeing a series of medium term development plans with the local authority provided investment confidence and certainty to the site owner/operator while reassuring the local authority on the scale of impacts and enabling development to be permitted in the Green Belt;

- g this was accompanied by active marketing of the site, efficient visitor management and particularly its high profile facilities marketed as world's best thrill experiences;
- h the involvement of an experienced visitor destination operator/developer with access to funding was also critical to growing visitor numbers.

10.40

Cardiff International Sports Village lies in Cardiff Bay, within the Cardiff urban area. The village complex currently has a 50 m swimming pool and a temporary ice rink (Cardiff Arena) in addition to a white water canoeing and kayaking centre and there are plans for a snow dome and a hotel.

This development differs from Thorpe Park in being public sector led. While it has achieved a reasonable level of facilities and visitors, it has still to reach its full potential in terms of the original concept for it, partly because of its funding/delivery model and partly because of the recession. It may not, therefore, provide a positive role model for what the LVWWC site could become, or necessarily a feasible model for delivery.

However, since it has not been possible to find other, public sector led sports/leisure visitor destinations in the UK, some key points in its approach used to deliver this development may be of relevance. These include:

- a the development was led by a public sector body (Cardiff City Council) which owns the land;
- b an overall masterplan for the site was developed at an early stage and an outline planning permission obtained by the Council to provide a framework for development;
- c the leisure facilities have typically been built using a public-private funding mechanism, with private operators running the facilities;
- d much of the funding for development came from the sale at a relatively high value of residential and retail plots around the site;
- e this funding approach was badly affected by the recession and shortage of development finance.

Timeline for Development and Intervention

10.41

Drawing the above elements together, a broad series of actions over time can be set out for developing new facilities around the LVWWC site and initiating necessary interventions to help bring development forward. In general terms, this has sought to differentiate between;

- **Short-term** developments/interventions which should be implemented before the centre re-opens in Spring 2013 following the Olympic Games;
- **Medium-term** developments/interventions which would occur after re-opening the LVWWC but prior to it hosting the Canoe Slalom World Championships in summer 2015;
- **Longer-term** developments/interventions for 2016 and afterwards.

10.42 Suggested actions for each of these time periods are set out below.

Short-term Actions

10.43 Within the next 18 months or so, public sector stakeholders should seek to:

- identify and plan for introducing small-scale activities which could be undertaken by the LVRP on or close to the LVWWC site without significant capital investment - these could include archery, bike hire and a zip wires, as well as an improved catering offer at the LVWWC;
- set up a local 'partnership' body which would agree ways to maximise the local economic benefits of the LVWWC and include representatives from Broxbourne & Epping Forest Councils, Waltham Abbey town council, local business representatives, and the LVWWC itself;
- investigate potential to promote festivals and other events with local partners at/near to the LVWWC;
- initiate work on formulating an area masterplan and/or Area Action Plan that sets out parameters for future development around the LVWWC in a more detailed and statutory basis;
- produce an investment prospectus to assist in promoting the LVWWC site and nearby sites to prospective operators/developers of larger scale leisure facilities and in identifying private sector partner opportunities;
- explore feasibility/viability of some potential leisure activities with operators/developers;
- develop a marketing and branding strategy which would allow future developments across a range of activities to be marketed through a single portal, which could also provide links to other local businesses (e.g. accommodation);
- seek funding and planning permission for improved pedestrian links to Waltham Cross station and Waltham Abbey town centre via Station Road.

Medium-term Actions

10.44 Following the re-opening of the LVWWC to the public in spring 2013, but before the Canoe Slalom World Championships in summer 2015, public sector stakeholders should seek to:

- implement improvements to local pedestrian routes;
- develop further on-site activities at the LVWWC (e.g. a climbing wall, aerial ropes course. Segway racing) as well as offer packages of off-site activities (e.g. mountain biking in the Epping Forest);
- develop the ticketing offer and portal, including "all-activity" passes and tickets for various combinations of activities (e.g. rafting in the morning, mountain biking in the afternoon);

- adopt an area masterplan/Area Action Plan, and establish development/partnering agreements with private sector operators where relevant;
- if necessary, seek planning permissions for relevant sites/facilities to provide greater confidence for private sector partners/developers;
- establish job training linkages with local providers and operators and establish combined local recruitment portal to advertise job opportunities at the LVWWC/nearby leisure facilities.

Long-term Actions

10.45

In the longer term, following the Canoe Slalom World Championships in 2015, public sector partners should seek to:

- continue to diversify and add to the range of events and small-scale activities available on and close to the site;
- develop ancillary and larger-scale facilities in conjunction with private sector operators and developers; and
- implement the remaining infrastructure improvements and developments contained in the area masterplan/Area Action Plan.

11.0 Overall Conclusions and Recommendations

11.1 The following general conclusions can be drawn from this study.

Lessons from Established Centres

11.2 From a review of over 30 white water centres in the UK and overseas, only a few have developed into wider visitor destinations with a wide range of leisure/sports activities. Those that have done so focus on other outdoor and 'adrenaline' activities provided as a package to create a full day or weekend of activity for individuals, groups and corporate users, along with providing a venue for events.

11.3 This experience suggests that white water centres, and other comparable participatory sports attractions, do not by themselves tend to attract significant other leisure or visitor facilities around them, or develop organically into wider visitor destinations. Demand for sport/leisure activities often needs to be created by providing facilities. This indicates that a pro-active approach, strong marketing and other interventions will be needed if the LVWWC site is to develop into a wider leisure destination that can bring significant economic benefits.

11.4 To illustrate what is achievable, there are several examples of leisure parks, with a white water centre at their heart (e.g. Cergy near Paris and the US National White Water Centre in North Carolina) which have successfully developed into sizeable visitor destinations focused on outdoor recreation with between 400,000 and 1.5 million visitors annually, and supporting several hundred jobs. In these cases, activities, marketing and development are coordinated by a single central organisation.

Opportunities and Constraints

11.5 There are significant opportunities for further leisure development in the area around the LVWWC provided planning and environmental constraints can be overcome and market perceptions improved. The main opportunities arise from proximity to the major population catchment of Greater London, the increased profile of the area arising from the Olympic LVWWC facility and the availability of some development land and established visitor attractions close to the centre.

11.6 There are also some potential constraints on further leisure development on the LVWWC site arising from its Green Belt designation, from flood risk on parts of the site and current low parking levels. Adjoining land within the Lee Valley Park and the nearby Gunpowder Mills site also has significant constraints from environmental protection designations, flood risk, Scheduled Ancient Monuments and high electricity pylons.

11.7 This does not necessarily mean that desirable forms of leisure development will be restricted. It will be more a case of taking account of constraints and ensuring that appropriate forms of development are directed towards the most suitable sites for them, including sites nearby with fewer restrictions. The

degree of development risk arising from planning and environmental factors would also need to be taken into account when identifying facilities that could be promoted to the market.

Market Potential

- 11.8 To attract new investment by operators/developers and enable certain other types of new facilities to emerge on the LVWWC site or nearby, visitor numbers to the area would need to be significantly increased by adding a bigger attraction, or a combination of other visitor attractions. The LVWWC can act as a catalyst for further development when combined with pro-active measures to bring other sports/leisure facilities to the site. Such additional attractions and activities will have the greatest impact where they have some form of leisure activity connection to the LVWWC. Developments should therefore be mainly active, adrenaline-type facilities rather than ones relating to passive enjoyment.
- 11.9 In this way, the collection of activities close to each other could be marketed under a theme. This new Lee Valley Park 'activity zone' could develop its own identity and become a destination in its own right, perhaps an adrenaline sports park for London. Whilst the activities and developments should mainly be 'active' facilities, they can also be developed to appeal to a range of age groups and levels of excitement. What is important is that collectively the developments possess a uniqueness that makes the site desirable across the catchment area and that the individual parts fit together as a coherent set of facilities that, from the consumers' perspective, appear to be part of a single offer.
- 11.10 If a number of additional attractions or facilities are combined with the LVWWC and are actively promoted to the large population catchment, then a critical mass of facilities emerges which could attract a larger number of visitors, who in turn will demand other ancillary services such as cafes and restaurants, sports retail and eventually hotels.
- 11.11 In that context, a range of potential sports/leisure activities and associated services were considered against various criteria to identify which ones are likely to be attracted to this location and had reasonable prospects of being viable and developed. This process took account of the potential population catchment, the existing supply of competing leisure facilities in the area and consultations with operators of similar facilities where possible as well as how well each potential use/facility could:
- a fit with the Lee Valley Park brand (for uses within the Park)
 - b complement the LVWWC offer
 - c avoid harm to the current Lee Valley Park offer
 - d form part of a marketable offer that has unique selling points
 - e be able to be developed in phases
 - f provide positive economic impact - will it attract visitors from outside the area
 - g attract private sector investment

- h demonstrate some potential to be viable
- i be developed in close proximity to other aspects of the offer whilst remaining outside of the park boundary.

11.12 The table below identifies uses that could be attracted to the LVWWC site and nearby areas over different timescales/development phases.

Short Term (could be developed immediately)	Medium-term (requires critical mass of visitors)	Long-term (when established leisure destination)
Archery Zorbing/Hydro Zorbing Zip-wire Aerial Ropes Course Bungee Trampoline Golf Driving Range Bike Hire Outdoor Climbing Wall Golf Frisbee Laser Clay Pigeon Shooting Paintballing Children's Indoor Play area	Indoor Surfing Go-karting/Indoor Karting Indoor Climbing Centre Laser Quest Health & Fitness Club Sailing/Watersports	Budget hotel Sports retail Restaurants/bars Large indoor facility
~173,000 visits	~254,000 visits	600,000 - 1,100,000 visits

11.13 It is important to emphasise that this initial assessment of potential uses which could work in this location should be explored in terms of viability/feasibility with a prospective operator/developer before moving forward on any specific activity. This will provide the most robust indication of its deliverability although this should not necessarily restrict the Park from bringing forward some facilities itself where viability is less uncertain.

Economic Impacts

11.14 The scale and type of leisure development, and numbers of visitors, that can be attracted to the area around the LVWWC over the next 5 years or so appears unlikely to be greatly constrained by future economic conditions and weaker consumer spending growth. Only a few larger facilities that require greater capital investment, and where operators will be more sensitive to visitor numbers, would be less likely to come forward under weaker economic and development market conditions. What will be more important will be whether the area can widen its range of leisure facilities around the LVWWC so as to build up sufficient visitor numbers that can attract some larger scale uses.

11.15 If all the identified facilities were developed, cumulatively in the order of 600,000 visits p.a. could be attracted to them, and potentially over 1 million p.a. if a large visitor attractor / indoor sporting facility could be brought to the area. This number could be increased if events were held although this may conflict with other activities. However, some of these visitors would be using several different sporting facilities on their visit and some facilities (e.g. hotel,

restaurants) would be simply feeding off the visitors to the sporting activities but not attracting them in their own right. The actual number of visitors to the area could therefore be perhaps only half to two thirds of 600,000 p.a.

- 11.16 In terms of the level of job generation associated with new leisure facilities attracted by the catalytic effect of the LVWWC, it should be possible to support up to 330 direct jobs in the area, including the LVWWC itself, and potentially up to about 400 in total if some large scale leisure uses can be attracted. Including indirect or spin-off jobs, the total impact on local employment could be as much as 430 jobs in the longer term. The Table below illustrates potential levels of job growth over time under different economic conditions.

Employment growth by growth scenario (Cumulative)

Scenario	0 – 5 years (No. of Jobs)	6 - 10 years (No. of Jobs)	10+ years (No. of Jobs)
Low Spending Growth/ Development Finance	130	220	220
Moderate Spending Growth/Development Finance	130	220	330
High Spending Growth/Development Finance	130	220	380

- 11.17 These new jobs would contain a reasonably wide range of opportunities at different skill levels, with a significant proportion of both higher level managerial posts and lower skilled jobs. This range of jobs should provide opportunities for many of the unemployed residents in the area.
- 11.18 A significant proportion of these new jobs are likely to be seasonal in nature and part-time. This reflects the nature of the leisure sector generally. To increase the job benefits, a focus on attracting more indoor sporting facilities will be important.
- 11.19 Other economic effects will include increased visitor spending in the local area, potentially some effects on the local supply chain and some local economic impacts from on-going construction activity and maintenance of facilities, such as construction jobs and spending with local suppliers.

Job Skills/Training

- 11.20 In terms of maximising access to the new jobs by local residents, desirable measures include:
- the Park Authority inviting all leisure operators and its delivery and service partners to advertise their jobs on the Authority's own website, and ensuring jobs are advertised to the local community;
 - the Park Authority providing a link on its website to careers advice;

- c planning permissions/ S106 agreements for new leisure uses requiring a specified proportion of local recruitment, or funding for a job brokerage scheme administered by the Park Authority;
- d ensuring that new leisure facilities tap into Park Authority processes for accommodating volunteers and work experience placements;
- e the Park Authority making places on its internal courses available to leisure facility providers at a discounted rate;
- f establishing links with established training providers such as Hertford Regional College to ensure suitable courses are available and workers in the leisure cluster facilities can be placed on them;
- g the Park Authority funding apprenticeships for leisure facility managers.

Physical Infrastructure Requirements

- 11.21 Consideration was given to any improvements to local infrastructure required to support new leisure development around the LVWWC, including both physical infrastructure and social-infrastructure (e.g. employment training etc).
- 11.22 In terms of additional physical infrastructure, the main requirements would include:
- improvements to footpaths between the LVWWC site and nearby town centres and rail stations;
 - provision of additional car parking or better use of existing parking provision in the area to accommodate increased visitor numbers;
 - measures to improve public transport access by visitors including a combined all-day ticket to the LVWWC site with discounted local bus/train or park and ride fares;
 - preparing a Travel Plan for the LVWWC site/leisure uses cluster to maximise non-car journeys and hence minimise future parking and highway infrastructure requirements.

Planning/Tourism Strategies

- 11.23 Current planning and tourism policies for the area are broadly supportive but not adequate to actively promote the type and scale of development envisaged. There also appears to be no detailed strategy to deliver these aims or market the area as a visitor destination. The following types of approaches could be considered within local development plan documents:
- a designating the LVWWC site and the land around it as an area to be covered by an Area Action Plan within the Local Development Framework process;
 - b designating the LVWWC site and appropriate adjoining land as an area to which a Local Development Order could apply, with a relaxation of planning restrictions for certain types of leisure development;

- c consider whether the Green Belt boundaries should be amended in this location to facilitate leisure development;
- d include policies in local development plans which support leisure development in this location, subject to appropriate criteria.

11.24 In terms of tourism strategies, a policy would be helpful which provided general encouragement for leisure/sport-related development in this location where it would enhance the LVWWC, fit with the brand for the area and help it develop as a wider visitor destination.

Spatial Framework

11.25 Key elements of a Spatial Framework for the area around the LVWWC are set out to provide guidance on the spatial distribution of facilities, and how these facilities could be linked and accessed to help create a wider visitor destination. The Framework comprises a series of plans and supporting tables which can inform future local development plans or Area Action Plans, used to market the area or support funding bids.

11.26 The Spatial Framework focuses on the local area around the LVWWC and Waltham Abbey/Waltham Cross, but also identifies strategic linkages to facilities within the wider area, for example to Epping Forest. Clusters of activities are labelled as Activity Zones, the character and constraints of which are used to formulate a preferred spatial distribution of potential future activities. In order to put the LVWWC in context and capture the complex potential associations between activities, the Framework also identifies a broad range of potential facilities (i.e. beyond just adrenaline sports or activities which offer high job creation/economic potential).

11.27 The Spatial Framework also provides commentary on Opportunities Sites for new investment, analysing how these locations are currently connected into the movement network and where improvements to connectivity could add to potential economic and social benefits. It also provides broad strategies and interventions for preferred physical and non-physical connections within the study area which will support the Linkage Concepts and Opportunity Sites.

Interventions

11.28 To develop the wider visitor destination envisaged for the site, specific actions and leadership on development may be required to deliver additional facilities. For some of the uses identified, minimum intervention may be needed.

- a the Park Authority developing some facilities itself, particularly those requiring more limited levels of investment;
- b promoting potential opportunities to developers/operators in the form of an investment prospectus, or some form of masterplan identifying what types of facilities might be developed and supported by market information e.g. population catchment and park visitor numbers;

- c for facilities requiring greater levels of investment and/or specialist operator expertise, consider bringing in a private sector development partner.
- 11.29 For those uses that the market may not be willing to take the risk of development in an untried location, at least in the short term, probably types of facilities requiring significant capital investment and larger numbers of visitors, other forms of intervention could be considered:
- a the Park Authority (and/or local authorities) could provide a site with outline planning permission and install essential services/infrastructure to make the development more attractive to the market and reduce risk;
- b public sector funding could be sought to install infrastructure to the site and potentially fund some of the new facilities;
- c the Park Authority or other landowner could reduce the developer's risk by agreeing to a share of profits rather than charging for the land costs or rent;
- d the Park Authority (and/or local authorities) could provide initial subsidies to the operation of some desirable activities within the Park.

Marketing/Branding

- 11.30 To develop the LVWWC site and its immediate surroundings into an attractive location for investment initially, and ultimately a major visitor destination for adrenaline-type activities, it will be essential to prepare:
- a brand strategy which sets out how the site and other related activities will relate to the market and also identifies how the site will fit within the overall brand of the Park;
 - a marketing strategy which identifies specific target markets, communication channels and the roles and responsibilities of the Park Authority and its partners.
- 11.31 The Lee Valley Park Authority is currently developing a new brand for the park as a whole while the LVWWC has its own individual brand - "Go Whitewater". However, given the range of other major destinations within the park, this brand would be less effective at advertising the much wider variety of facilities and events which are likely to be developed around the centre.
- 11.32 Over the medium term as new activities are developed, the existing brands should be extended or adjusted to provide a clear message for the area around the LVWWC. By then, the "Go Whitewater" brand could be too focused on water activities specific, while the Lee Valley brand may not be specific enough. However, any new or extended brand will clearly have to be closely related to both the existing brands.
- 11.33 Once the brand strategy has been developed, specific marketing objectives should be set to:

- a position the site as an exciting and invigorating indoor and outdoor experience;
- b create a visitor experience which has strong local market appeal and is also recognised nationally and (in specialist markets) internationally;
- c ensure that visitors' needs and expectations lie at the heart of the new experience;
- d increase visitor numbers to this part of the Park, increasing dwell time and generating spend;
- e develop commercial revenue and private income to support the ongoing marketing, interpretation and development of the site.

Delivery Actions

- 11.34 The report also sets out a broad series of actions over time for developing new facilities around the LVWWC site - in the short term before the 2012 Olympics, the medium term up 2015, and the longer term - and initiating necessary interventions to help bring development forward. For the short term, these would include:
- initiate work on formulating an area masterplan and/or Area Action Plan
 - produce an investment prospectus for promoting sites to prospective operators/developers
 - explore viability/feasibility of some potential facilities with operators
 - explore private sector partner opportunities
 - develop a marketing and branding strategy
 - identify small-scale leisure activities which could be implemented by the LVRP.
- 11.35 In addition, measures that could be used to help maximise local visitor spending would include:
- a ensuring that branding/marketing exercises include local businesses in order to make visitors aware of other attractions and facilities;
 - b ensuring that visitor 'bundles' are offered on the LVWWC site and other facilities to incentivise and advertise other local attractions/activities;
 - c improve pedestrian links and signage between the centre and Waltham Abbey town centre in order to encourage visitors to visit the town; and
 - d setting up a local forum to identify initiatives to maximise local economic benefits from the LVWWC and develop its role as a visitor destination, including representatives of local authorities, local businesses and the Park/LVWWC management.

Appendix 1 List of Consultees

List of Consultees

- 1 Mark Underwood, Brookbank Canoes, Waltham Cross
- 2 Royal Gunpowder Mills, Waltham Abbey
- 3 Simon Ricketts, Centre Manager, Lee Valley White Water Centre
- 4 Stephen Bromberg, Lee Valley Regional Park Authority (PR and Branding)
- 5 Elizabeth Parkin, Invest in Essex
- 6 Lisa Bone, Essex County Council Culture & Tourism Department
- 7 Annie Hawkins, Hertfordshire County Council Tourism Department
- 8 USA National Whitewater Centre, North Carolina
- 9 Dutch Dreams Whitewater Centre, Holland
- 10 Sydney International Regatta Centre & White Water Centre, Penrith
- 11 Tees Barrage Whitewater Centre, UK
- 12 Cardiff Whitewater Centre, Wales
- 13 Wales National Whitewater Centre, Canolfan Trweryn
- 14 Cergy Whitewater centre, France
- 15 Castle Climbing Centre, London
- 16 MEPA Outdoor Sports Centre, Cambridgeshire
- 17 British Canoe Union
- 18 Fiona Breaker-Rolfe and David Hughes, Hertfordshire County Council Economic Development
- 19 John Haslem, London Borough of Enfield Economic Development
- 20 Hertfordshire Regional College
- 21 Cathy Macbride, Waltham Abbey Town Centre Manager
- 22 Kathryn Richmond, Waltham Abbey Town Council
- 23 Epping Forest Business Group
- 24 Hertfordshire Chamber of Commerce (No response)
- 25 Waltham Abbey Town Partnership (No response)

Appendix 2 Summary of Relevant Strategies and Policy Documents

Summary of Relevant Strategies & Policy Documents

Local Policy

The **Lee Valley 2020 vision** sets out the Regional Park Authority's aim to transform the park into a world class leisure destination over the coming decade, with a unique combination of activities, sights and experiences. Key business objectives (2010-13) relating to the LVWWC include:

- a Developing and maximising commercial opportunities by creating partnerships with private-sector leisure providers - this particularly applies to new attractions, especially those which complement 2012 facilities;
- b Capitalise on the new London 2012 venues to create innovative leisure packages which will attract new visitors to the park; and
- c Create a new brand, building a sense of destination for the Lee Valley as a prime area for sport and active leisure.

The **Broxbourne Economic Development Strategy** (2010-13) sets out the way in which the Council wishes to see the local economy change and develop in the coming years. In particular, key strategic aims include:

- a broadening the local economic base;
- b encouraging investment in local infrastructure including improved broadband access, utilities and improvements to transport and provide support to existing and new businesses;
- c improving the skills and educational attainment of the local population and access to employment opportunities;
- d supporting town centres in their evolving role;
- e maximising opportunities and benefits arising from the London 2012 Olympic Games;
- f provide support for residents and businesses affected by the recession; and
- g working towards a low carbon economy.

Specific actions arising from these aims include:

- a developing the Park Plaza northern site;
- b investigating the feasibility of developing Hoddesdon Industrial Centre, phases five and six and maximise the Council's role as landlord for start up premises on the existing phases;
- c redeveloping Greater Brookfield (see the Core Strategy section below for more detail);
- d identifying residents' skills needs that meet business requirements including the provision of, and access to apprenticeships;
- e improving access to employment opportunities for the local workforce;

- f targeting job opportunities close to areas of need;
- g creating an improved shopping experience, with more jobs and more people encouraged into the town centres; and
- h promoting leisure and tourism by ensuring the development of hotels and camping sites and by bringing forward sites for the sale of ancillary goods.

The emerging **Broxbourne Core Strategy** (submission version, December 2010) has *“enhancing a sense of community and sense of place by promoting unique assets such as the Olympic Lee Valley White Water Centre and Lee Valley Regional Park”* as a key policy aim. It also notes that the area will *“benefit from the legacy of a world-class leisure facility”*, and that *“the Olympics present a unique opportunity to raise the borough’s profile and an interest in sporting and cultural activities”*.

Policy CS5 on employment states that the council will *“support proposals for service/tourism uses that build on the presence and legacy of the 2012 Olympic Games, the Lee Valley White Water Centre and other unique assets such as Lee Valley Regional Park.”*

Policy CS7 sets out proposals for Greater Brookfield, including around 50,000 m² of shopping floorspace (including a department store and major shop units), eating and drinking places, multi-screen cinema, bowling alley, health and fitness centre, crèche, health centre, three star hotel, a residential village for elderly and retired people plus housing to the south-west of the A10 Turnford roundabout.

The **Broxbourne Local Plan** (2001-11) is somewhat dated and focuses mainly on open space provision. Policy CLT4 indicates that the Council supports the Lee Valley Regional Park Authority in the continuing development of the regional park in the expectation that development will be predominantly recreational uses appropriate to a regional park. Some essential intensive recreational uses, still appropriate in the park, may be acceptable if it can be demonstrated that such uses cannot be accommodated in the urban area due to extensive land requirements and that such uses would fit with the overall provision of leisure and sporting facilities within the borough.

The adopted **Enfield Plan** (Core Strategy, November 2010) contains a number of key challenges and opportunities relating to the local economy. These include *“attracting new sectors such as business services, high tech manufacturing, creative/media, hospitality, retail, health and social care, developing Enfield’s strategic position in the sub region and maximising benefits, such as those arising from the London 2012 Olympics and Paralympics Games and its Legacy Transformation”*.

In terms of visitors and tourism, the strategy supports *“proposals for a wide range of visitor accommodation such as hotels, bed and breakfast accommodation and self catering facilities”*, although only in town centres and other locations with good public transport access. It also supports *“visitor accommodation in the Upper Lee Valley when accompanied by proposals to improve public transport accessibility”*. There are also aims to;

- a Support the development and refurbishment of the Borough's conference facilities;
- b seek to retain and improve tourist attractions, and access to them;
- c continue to work with the Lee Valley Regional Park Authority and other partners to identify the priority mix of additional recreation and leisure facilities in the east of the Borough, particularly at Ponders End, Pickett's Lock and Meridian Water, and encourage more visitors to the Lee Valley Regional Park;
- d encourage new tourist attractions which are supported by appropriate infrastructure; and
- e work with partners to ensure the maximum opportunities and benefits arising from the London 2012 Olympics and Paralympics Games and its Legacy Transformation.

The **Enfield Skills and Employment Strategy (2008-11)** aims to support inward investment and business growth in the Borough, as well as increasing the skills and employability of the Borough's population. In order to realise these aims, the following goals are being sought;

- a an increase in the private sector's share of employment and the strengthening of the Borough's growth potential industries – business services, high technology manufacture, cultural, hospitality, retail, health and social care;
- b ensuring providers can supply in-demand skills and meet firms' recruitment needs through bespoke training and job entry services;
- c an extended job brokerage function providing an increase the supply of skills for growth sectors;
- d delivery of vocational lines of learning supporting the target sectors and occupations;
- e more specialised and market sensitive training through 'Train to Gain' and the Borough's 14-19 Strategy;
- f a reduction in the number of residents who lack an NVQ2 level qualification and the number of residents who have no qualifications at all.

The **Epping Forest Core Strategy** is currently at a very early stage of preparation, with Issues & Options consultation due to occur in summer 2011.

County and Sub-regional Policy

The **Greater Essex Integrated County Strategy** (December 2010) is a visioning document which aims to identify the priorities and outcomes needed to achieve increased economic growth in the County. The LVWWC's effects are most likely to be concentrated on the 'West Essex' sub-area, where the major economic drivers are identified as Stansted Airport and Harlow. The document notes that;

“elsewhere in the sub region there is a scattered pattern of smaller towns and villages which will receive limited growth. Green belt policy is a significant constraint in the southern part of the sub region. The sub region is generally influenced by the London labour market, and some of its local communities closer to London have a very strong commuting relationship with the capital. The London 2012 Olympic and Para Olympic events will be focussed on areas of north London which are very close to the sub region. The legacy arrangements and economic development opportunities arising from this will be important factors for the sub-region to consider.”

The **Tourism Growth Strategy for Essex (2007)** notes that the County has been underperforming in tourism terms compared to some of its immediate neighbours, such as Kent, Norfolk and Suffolk. The document therefore sets out strategic aims to increase the value of tourism to Essex by 4% per annum to over £2 billion and to create an additional 7,000 jobs within 5 years. It aims to do this by making Essex;

- a an area that people visit rather just travel through;
- b a destination of choice for people in London and the South East for a high quality short break or weekend away;
- c an area known for its cultural offering, activity and special interest tourism; and
- d an area known as an accessible and affordable destination for conferences and meetings and an alternative to London.

In order to achieve this increased growth, it is recognised that perceptions of the county will need to be improved, both within and outside the county, the business tourism market will need to be developed, and more made of transport gateways, especially the airports.

Three main products identified as key to the development of Essex’s tourism industry and sectors for future promotion are: Cultural tourism; Business tourism (particularly smaller meetings and conferences); and Activity and Special Interest tourism (including cycling, walking, sailing and antique-hunting etc).

The main areas of development that need to be addressed are the poor quality of some attractions and hotels, the lack of hotels, or suitable hotels in appropriate locations, and recruiting staff and improving skills levels, particularly customer service skills.

The **Hertfordshire Economic Development Strategy 2009 - 2021** (2010) notes that whilst the county has historically been the ‘engine’ of the East of England economy, it has underperformed in the last decade. The strategy is supportive of tourism, culture and sport as an economic sector and promotes the development of a ‘cluster’ of such economic activity in the county. Specifically, it aims to increase the value of tourism to the local economy by 5% by 2012 and increase employment in the ‘accommodation and food service’ sector.

It aims to achieve this by:

- a maximising tourism and cultural opportunities from the 2012 Games to attract and retain high calibre staff and dynamic enterprises;
- b supporting the tourism & leisure sector in raising the quality of their offer and provide high quality marketing material to promote Hertfordshire as a visitor destination, especially for short breaks;
- c supporting and offering 'Welcome Host' training for the tourism, leisure & hospitality sector to retain staff, increase skills and enhance the visitor experience;
- d exploring the use of the county's film heritage to enhance the Herts tourism brand; and
- e seeking to offer access to cultural and tourism opportunities at a minimal cost to our residents.

Other, more general aims include;

- a ensuring that the skills of the workforce meet the needs of current and future employers, and encourage a culture of lifelong learning amongst business, young people and adults of all ages;
- b providing those experiencing need and deprivation, or otherwise excluded from the workforce, experience to enable them to enter the labour market;
- c encouraging economic growth that has strong low carbon credentials and demonstrates compliance with best practice for sustainable development;
- d encouraging the regeneration of existing employment areas and town centres in order to improve economic and social wellbeing in those communities, within the constraints imposed by the environment

The document notes that the Olympic Games will leave behind an important legacy - the white water canoe centre itself will become a significant regional leisure attraction expected to attract over 70,000 canoeists and rafters every year, creating demand for accommodation, catering, bars and other services. This will act as a catalyst to the wider regeneration of Waltham Cross creating new business and employment opportunities.

Appendix 3 Implementation Case Studies

Implementation Case Studies

This appendix contains some examples of successful visitor attractions/leisure complexes which have been developed over time from a single facility or concept. This illustrates the level of development that can be achieved and the approaches used to do this.

Thorpe Park

The Thorpe Park theme park in Surrey to the south west of London started off in the 1970s as a countryside leisure water park based on lakes formed within 109 ha of former gravel pits owned by the Ready Mixed Cement (RMC) Group. This reflected RMC's decision in the early 1970s to develop the land into a leisure attraction based on its location in an established tourism area (Runnymede) and its proximity to London and the planned M25 motorway. The site lay within the Green Belt in an area liable to flood and has some features of nature conservation interest.

In 1983 change of use was permitted to a leisure activity centre incorporating land and water based sports, education, historical exhibits based on maritime history, family entertainment and leisure activities. Introducing new attractions was seen as key to maintaining Thorpe Park's success and encouraging visitors back to the Park. Various water-based and other rides were introduced to broaden the range of attractions and help build up visitor numbers. These included waterbus trips, windsurfing facilities and a 3D cinema and a working farm. By the mid-1980's a future vision - to become a theme park - had been agreed.

From 1987, a decision to compete more seriously in the leisure industry led to more intense and exciting rides being added, many water based such as "Thunder River", "Canada Creek", "Fantasy Reef", "Depth Charge", "Hudson Rover Rafters", "Viking Rowers" and "Wet! Wet! Wet!" torpedo slides.

By the mid 1990s the Park was suffering from a lack of investment and a gradual decline in visitor numbers. In 1998, it was bought by the Tussauds Group, which already owned themed visitor attractions such as Madame Tussauds, Warwick Castle and Alton Towers resort. A five year development plan was drawn up which aimed to reverse falling visitor numbers and 'create a viable business capable of competing with other leisure attractions in the South East'. The new owner continued investing in more rides including Tidal Wave, the UK's highest water ride at the time, accompanied by heavy marketing. Older rides are continually being replaced with newer ones each year. These included iconic rides such as Colossus, the world's first rollercoaster with 10 inversions and Stealth, Europe's tallest and fastest Launch Coaster with the 4th steepest drop in the world. These raised the profile of Thorpe Park with those seeking high adrenaline rides. An electronic paging system was also introduced to minimise queuing for rides.

In 2007, the Tussauds Group was taken over by Merlin Entertainments, which continues to open new facilities and replace older ones. Aimed at diversifying the Park's role and reducing seasonality, planning permission for a new 250 bedroom hotel, with leisure facilities, a swimming pool and conference facilities, was obtained in 2009.

This development process has been led since 2000 by a series of Medium Term development plans for the park which provided a comprehensive plan for the development of the site as it lay within the Green Belt. This Plan covered was agreed with the local planning authority. These Plans set out proposed developments within the Park over the next five years along with their likely impacts and visitor forecasts, typically plan for a major new attraction every three years, with some smaller attractions in the years in between.

This process led to visitor numbers rising from only 300,000 in 1979, when the water park first opened, to over 1 million by the mid 1980s, 1.4 million by 1990, 1.7 million by 2007 and almost 1.9 million by 2009. Thorpe Park is now the 12th most visited theme park in Europe.

Thorpe Park differs from the LVWWC site in that its development has been brought forward by private sector owners and leisure operators. However, some key points of relevance are:

- a a substantial leisure development has been achieved within what was originally a Green Belt site (now a Major Developed Site within the Green Belt) with flood risk issues near the M25 motorway;
- b visitor numbers were increased from 300,000 to almost 1.9 million by gradually adding more "adrenaline type" attractions and continually refreshing the original leisure offer along with active marketing;
- c a modest water based attraction has been expanded over time into a diversified family oriented visitor attraction with elements aimed at reducing seasonality;
- d this site has gradually built up to employ in the order of 1,100 employees, over 900 of which are seasonal workers;
- e the mechanism of agreeing a series of medium term development plans has provided investment confidence and certainty to the site owner/operator while reassuring the local authority on the scale of impacts and enabling development to be permitted in the Green Belt.

Cardiff International Sports Village

Cardiff International Sports Village has been constructed on a former industrial and dockland area, some 3 km south of Cardiff city centre. It lies on a small peninsular between Cardiff Bay (which has now been turned into a freshwater lake by the construction of a barrage) and the Ely river, and is owned by Cardiff City Council.

The concept of a 'sport village' on this site in Cardiff Bay first arose in a late 1990s masterplan prepared by consultants for the City Council. The idea arose

because of the need to find new locations for the city's swimming pool and ice rink which were being demolished as a result of retail and leisure developments in the city centre. It was identified that the Cardiff Bay site could cater for these as well as a wider range of sport and leisure uses and thus achieve a critical mass of visitors which could facilitate the further development and infrastructure provision in the area, which is one of relatively few remaining development sites in the wider Cardiff Bay regeneration area. The masterplan was followed by an outline planning application for the site, submitted by the City Council.

The site currently has a 50-metre Olympic-standard swimming pool (with seating for 1,000 and 4 flume rides), a temporary ice rink ('Cardiff Arena' with seating for 2,500) and the white water centre. It is understood that the funding for these facilities has come partly from the public sector and partly from private sector developers/operators. In some instances, this has involved finance being raised through land sales (for retail and residential uses), and also by providing long-term, guaranteed income streams for private sector operators to encourage them to invest in new facilities.

However, the links between the different scheme elements are currently somewhat tenuous and it appears that few visitors use more than one facility at a time. Furthermore, the development remains incomplete with a number of undeveloped areas and plots. A super casino was originally proposed for the site and would have provided a significant degree of funding, but this was rejected by the government. Also, the recession has now resulted in much reduced land values and lower private sector investment, meaning that any future developments have stalled. This indicates that this model of funding and development may not be feasible in the current economic climate.

This has meant that the overall growth of the Sports Village concept may have stalled, at least temporarily, before reaching its full potential. It may not, therefore, provide a positive role model for what the LVWWC site could become, or necessarily a feasible model for delivery.

Nevertheless, some key points regarding the approach used to deliver this development may be of relevance and include:

- a the development was led by a public sector body (Cardiff City Council) which owns the land;
- b an overall masterplan for the site was developed at an early stage and an outline planning permission obtained by the Council to provide a framework for development;
- c the venues have typically been built using a public-private funding mechanism, with private operators running the facilities;
- d much of the funding for development came from the sale of high value of the residential and retail plots around the site.

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