



## Briefing Note

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Date 4 July 2014  
To The Royal Borough of Windsor and Maidenhead  
From NLP

### **Subject LEGOLAND Windsor Resort: Investment Strategy Context**

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#### 1.0 **Investment Context for LEGOLAND Windsor Resort (LLWR)**

##### **Leisure/Tourism Market**

1.1 The leisure/tourism market is fast changing and very broad, encompassing a range of products and activities, of which, theme parks/attractions are just one element. The leisure/tourism market is a highly competitive environment and offers much choice for customers who, in turn, need to decide where to spend limited resources (time and money). Accordingly, each operation/ business must ensure they are meeting current expectations and are competitive at least to retain a market share. People make choices about how to spend 'leisure' time and the money required to 'indulge' that choice. LLWR needs to continually revitalise its offer not only to encourage repeat visits from previous customers but also to attract new visitors to replace current visitors who move out of its demographic and age profile annually. To meet this challenge and attract people's leisure time, LLWR seeks to refresh existing attractions at the Park and has an investment strategy to ensure the Park is regularly rejuvenated. It is important also that theme parks adapt the 'product' which they offer to respond to changing demands and trends in the tourism/leisure market. Many visitors have experience of overseas attractions and these can set a benchmark for the quality and range of facilities expected at a UK theme park, such as LLWR.

##### **Investment Strategy at LEGOLAND Windsor**

1.2 Visitor numbers to LLWR (like any theme park) fluctuate from day to day, seasonally and year to year. It is evident that without investment on an ongoing basis, visitor attractions decline and can become unviable. Simply maintaining visitors requires a leisure attraction to invest. The history of the old Windsor Safari Park demonstrates what happens where there is a lack of investment.

## Reasons for Investment

- 1.3 The reasons for investment at LLWR are two-fold:
- 1 To improve the guest experience - the LLWR has key performance indicators for guest satisfaction and these are the primary driver for the proposed investment at the Park; and
  - 2 To smooth visitor numbers – the provision of new and refurbished attractions at the Park, including covered rides, will smooth visitor numbers over the season and ease capacity on peak days as there will be more for visitors to do and experience on off peak days when the weather is poor.

## 2.0 Future Proposals for LEGOLAND

2.1 Within the existing MDS boundary there are now very few opportunities for new development and some of the older existing attractions are in need of repair and upgrading. Therefore, LLWR has sought to refresh some of the existing attractions as part of its investment strategy. LEGO MINILAND Star Wars opened in April 2012, 'DUPLO Valley' opened in May, for the 2013 visitor season and 'Pirate Shores' opened in June, for the 2014 visitor season. Each of these attractions were refurbished and/or replaced existing facilities to ensure guest satisfaction remains high and LEGOLAND retains its position as a leading theme park. In turn, this means it remains viable.

2.2 In the medium to long term, dependent upon capital investment monies available, LLWR is considering the following development at the Resort which we would like to discuss and consult on with Officers, Councillors and residents. Much of the proposed development comprises refurbishment and replacement of existing attractions to ensure LLWR remains viable:

- 1 A range of operational improvements e.g. highway mitigation measures.
- 2 Complete the regeneration/replacement of original areas/rides in the core of the existing Park (defined by the current MDS) – including:
  - i a new show venue;
  - ii extension to 'DUPLO Valley';
  - iii refurbishment of the 'City' and 'Harbour' areas;
  - iv redevelopment of the 'Imagination Area'; and
  - v 'Land of the Vikings' redevelopment.
- 3 Ride towards the southern end of the Park.
- 4 Provision of additional types of accommodation – e.g. sustainable, eco-lodge style development and an extension to the hotel.

2.3 In relation to point 1 above (a range of operational improvements, including highway mitigation measures), LLWR has arranged (and continues to do so)

regular Traffic Meetings with Officers of RBW&M, Bracknell Forest Council, Surrey County Council and the Highways Agency to discuss measures to reduce LLWR's traffic impact. One of the outcomes of these meetings has been the Traffic Signs Trials, which have trialled alternative signing for LLWR aimed at managing the impact of traffic associated with the Park on the neighbouring highway. In particular, a key aim of the signing trials was to improve traffic flows at the Imperial Road and St Leonards Road Junctions. The signing trials have been deemed a success and following a full analysis of the results, LLWR will continue to liaise with the relevant highway authorities to implement various traffic sign works. A number of measures are being discussed and will be implemented in the short to long term.

- Short term:
  - Implementation of local signing strategy in line with success of the alternative routes trialled (Phase 1).
- Medium term:
  - Implementation of the wider signing strategy.
  - Implementation of capacity improvements to Winkfield Road.
- Long term:
  - Implementation of further measures at the Winkfield Road access to the Park.

2.4 Implementation of these measures and the ongoing assessment regime of LLWR's traffic impact will be integral to LLWR's Framework for future development (having said this, the short term measures set out above could be implemented this year). It is as much in the interests of LLWR as it is our neighbours that guests to the Park have a relatively easy journey as this is vital to ensuring high visitor satisfaction as it impacts significantly on the overall guest experience and so LLWR will continue to engage with RBWM Highways.

2.5 LLWR and its team want to discuss these ideas with the Council and neighbours and would welcome consultation. It is anticipated that a 'development framework' will be prepared to set out a comprehensive and coordinated approach to the site's future. This will take into account existing and emerging planning policy and guidance (particularly the NPPF).

### 3.0 **Summary**

3.1 The economic importance of tourism is well recognised including within Government policy. There are many benefits to supporting and enabling development at LLWR as it is a key employer within the Royal Borough and contributes significantly to the value and spend on tourism within RBWM. Investment at LLWR is clearly essential to enable the Resort to remain competitive against both global (particularly European theme parks) and

national/local competitors and retain its position as a leading theme park in the South East.

- 3.2 The leisure/tourism market presents a number of challenges which LLWR needs to respond to so that it remains viable and competitive, particularly in terms of attracting people's leisure time and spending. The current Haunted House application reflects LLWR's current investment proposals for the 2015 season at the Resort to smooth visitor numbers over the season and ease capacity on peak days as there will be more variety for visitors to do and experience on off peak days when the weather is poor.
- 3.3 LLWR looks forward to engaging and consulting with the Council and others to discuss the future plans, to guide LLWR over the next 10 years or so.