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30 years

LEISURE management

ISSUE 1 2011

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Souvenir edition

Leisure Management is 30!

We look back at the changing face of leisure

PLUS:

- Greening Glastonbury
- Expansion for The Sanctuary Spa
- The Third Space plans rollout

ROBERT COOK

ON TAKING MALMAISON TO THE US

CAN PUBLIC SECTOR LEISURE SURVIVE THE CUTS?

Justin Timberlake

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HAPPY 30TH BIRTHDAY

Welcome to this 30th anniversary, souvenir edition of *Leisure Management*.

We've brought together our leading contributors to explore the ways the industry has grown and developed since 1981. We've also highlighted some new businesses which are innovating across the key sectors: spa, health and fitness, sport, leisure, hospitality, tourism and attractions.

The industry as we know it didn't exist 30 years ago and a dive into our archives reveals coverage of the launch of everything from health clubs, day spas and theme parks to short break holidays, multiplex cinemas and budget hotels.

And the pace of change is quickening as social media and mobile/online booking systems speed up the way people consume leisure and changing working patterns and demographics polarise social groups in terms of their capacity to enjoy and afford it.

In this issue we talk to serial entrepreneur Robin Hutson about Herb House, his latest hotel and spa venture (page 56). The interview highlights just how much things have changed as he explains the thinking behind his herb-covered roof garden – which serves as an outdoor space for yoga, tai chi and meditation – his smoke house, for smoking fish and meat for the restaurant and the hotel's raw bar. Any of these descriptions made in 1981 would certainly have met with a very blank stare.

Environmental issues are now top of the agenda for many operators, and on page 60 we interview Lucy Brooking Clark, green issues co-ordinator at the Glastonbury Festival, about the ways in which her team has tackled the challenge of removing 5,000 abandoned tents from the site and transporting sewage from the 175,000-strong audience 40 miles for processing. The solution they opted for was investing in their own local sewage works to reduce their carbon footprint – not something operators in 1981 would have had on their radar.

"The pace of change is quickening as social media and mobile/online booking systems speed up the way people consume leisure and changing working patterns and demographics polarise social groups in terms of their capacity to enjoy and afford it."

● *Leisure Management* is published by an exceptionally dedicated team here at Leisure Media and backed up to the hilt by an extremely supportive editorial board and very loyal advertisers – many of whom have been with the magazine for all its 30 years.

Although this Editor's Letter is normally reserved for industry comment, I'm sure you'll forgive me if I hijack it just this once to say a big thank you to them all for their support and encouragement over the years, with special thanks going to managing editor Magali Robathan, who has worked so hard in pulling this souvenir edition together.

And finally to you – our readers – thank you for subscribing and enjoy the issue!

Liz Terry, Editor liz@leisuremedia.com

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IN THIS ISSUE...

Robert Cook on surviving the recession, p24

How Justin Timberlake is greening the golf industry, p36

Continuum CEO Juliana Delaney, p40

The Sanctuary MD on the roll out of the women-only spa brand, p20

Leisure Management **news**

6 World Leisure
7 Sport
8 Commercial
10 Hospitality
12 Property
13 Health & Fitness
14 Attractions
15 Spa
16 Public Sector
17 Parks
18 Design

20 hotseat
ann murray
The Sanctuary MD shares her plans

24 interview
robert cook
The CEO of Malmaison and Hotel du Vin on why he's eyeing up the US

28 architect's focus
moshe safdie
The architect responsible for the $5bn Marina Bay Sands resort in Singapore talks us through the project

30 company profile
cadbury
We take a look at the confectionary giant's plans for 2011

32 company profile
big wave media
We check the features of Big Wave Media's new email marketing suite

34 what's the future for local authority leisure?
How can leisure departments survive the upcoming cuts in funding? Kath Hudson speaks to the experts

36 driving standards
Justin Timberlake is hoping to inspire the golf industry to go green with his eco-friendly Tennessee course

40 juliana delaney
As *Leisure Management* celebrates its 30th birthday, key industry figures look back at changes in their sector. Here the Continuum CEO argues the attractions industry has come a long way

43 bob cotton
The past 30 years have seen huge changes for the hospitality industry, says the former CEO of the BHA

44 ken robinson
The internet and low cost travel have revolutionised the tourism industry, argues the Tourism Alliance chair

ISSUE 1 2011

The opening of Herb House spa at Lime Wood in the New Forest, p56

Susan Harmsworth, p46

Co-ordinating Glastonbury Festival's green issues, p60

We check out the 3D/4D cinema market, p66

46 susan harmsworth
The ESPA founder analyses the changes seen by the spa industry

48 brigid simmonds
From the Lottery to the Olympics, the CCPR chair takes a look at the events that have shaped sport and leisure

50 space to grow
Kate Cracknell speaks to Third Space CEO Eric Dunmore about his plans

54 rob gregory
From legwarmers to mobile phone apps, consultant Rob Gregory reviews 30 years in health and fitness

56 forest retreat
We check out five star New Forest hotel Lime Wood's new destination spa

60 green fields
We look at how Glastonbury Festival is minimising its environmental impact

63 company profile pulse fitness

64 chris johnson
Pulse co-founder Chris Johnson looks back at the company's 30 year journey

66 visionary tactics
The latest advances in 3D and 4D cinema

70 senior's solutions
Grahame Senior advises on how to learn from the lessons of the past 30 years

72 leisure directory

74 final thoughts
Humberts chair John Anderson

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Buyers' guide:
For suppliers of products and services in the leisure markets, turn to p104

World Leisure

Russia to host 2018 FIFA World Cup

The proposed new stadium at Samara forms part of Russia's successful 2018 World Cup bid

FIFA has announced that Russia is to host the football World Cup in 2018 following a vote of its executive committee.

The Russian bid obtained an absolute majority after two rounds of voting and held off competition from Spain/Portugal, Netherlands/Belgium and England.

In addition to unveiling Russia as the host of the 2018 World Cup, it was also revealed that Qatar had secured the right to host the 2022 event after it received an absolute majority after four rounds of voting by executive committee members.

FIFA president Sepp Blatter said: "I have to say thanks to to the executive committee of FIFA because for 2018 and 2022 we go to new lands, because the FIFA World Cup has never been in eastern Europe or the Middle East."

Russian deputy prime minister Igor Shuvalov said: "You have entrusted us with the FIFA World Cup for 2018 and I can promise that you will never regret it."

Royal BC Museum plans expansion

The Royal BC Museum in Victoria, British Columbia, Canada, is seeking approval for the re-zoning of its current site as the first step in a major redevelopment scheme.

At the moment, the site is zoned for residential use and a new Comprehensive Zone with an expanded boundary could be tailored to the potential needs of the museum for the foreseeable future.

In addition to creating more display space, the scheme would address issues including inadequate environmental controls, a lack of storage, the risk posed to the museum by earthquakes and enforced restrictions on visitor numbers.

IMAGE: ROYAL BC MUSEUM

The Victoria attraction is looking to expand

The museum aims to increase its floor-space from 314,000sq ft (29,170sq m) to 890,000sq ft (82,680sq m). Collections are housed in the six-storey main building and the 14-storey Fannin building.

New sustainable concept from EuroDisney

Euro Disney and Groupe Pierre and Vacances Center Parcs have unveiled Les Villages Nature de Val d'Europe – a new sustainable vacation destination concept.

Central to the concept – which envisages 90 per cent of the resort retained as green space – is 'harmony between man and nature', reflected in both the accommodation and the activities offered.

The latter would focus on gardening, boating, hiking, horseriding and walking, with the site located 6km (3.7 miles) south of Disneyland Paris and centered around a 3,500sq m (37,670sq ft) geothermal lagoon. An adjacent waterpark is planned to be the largest in Europe.

The first 175 hectare (432.4 acres) phase is set to open in 2015 and will include the construction of 1,730 apartments or cottages within three villages – two of them around the lake and one in a nearby forest. A total of 70,000sq m (753,400sq ft) of indoor and outdoor leisure facilities is also planned.

Ruiz: The sector is being 'persecuted'

Third of fitness clubs 'could close' in Portugal

Pedro Ruiz, CEO of Portugal's largest health club chain Vivafit, has warned that up to a third of the country's health clubs could be forced to close due to a decision to increase VAT on fitness from 5 to 23 per cent.

The raising of the levy comes just two years after the Portuguese government reduced VAT on fitness and all supervised physical activities from 20 per cent to 5 per cent.

Speaking to *Leisure Management*, Ruiz accused the government of 'persecuting' the sector and said that fitness association Associação de Empresas de Ginásios e Academias de Portugal had initiated an action plan to try and revert the increase – due to come into force in January.

Sport

School sport plans unveiled

Education secretary Michael Gove has announced the government's vision for the delivery and funding of school sports.

Every secondary school will receive a share of £65m in 2011-12 and 2012-13 to enable PE teachers to help drive up participation in primary schools. Funding, which will pay for PE teachers to spend time out of the classroom one day a week, will also help establish an inter-school sports fixture network.

Meanwhile, school sport partnerships will be funded by the Department of Education until the end of the 2011 summer term at a cost of £47m. Lottery funding will help establish a framework of competition as part of the School Games concept, while competitive sport will be at the heart of a revised PE curriculum. Elsewhere, Dame Kelly Holmes will be invited to lead 'sporting advocates' to help promote school sport. The Youth Sport Trust will be funded to expand the Young Ambassadors programme.

There will be a focus on competitive sport

LCCC stands firm over legal challenge

Lancashire County Cricket Club (LCCC) will press ahead with work to redevelop its Old Trafford ground despite a legal challenge from Derwent Holdings.

A judicial review is being sought by Derwent Holdings – the owner of the nearby White City shopping park – over Trafford Council's decision to approve the £70m stadium scheme.

In September, LCCC received a boost after it was announced that the government would not call in the local authority's decision to back the development.

Working with Ask Developments, the current £32m investment phase is now underway to deliver new pitches, two new grandstands and player and media facilities. LCCC has embarked on a major overhaul of the stadium in order to help secure an Ashes test match in 2013.

Old Trafford is in line for a major overhaul

Willmott Dixon to build Forest Hill facility

Willmott Dixon has been appointed by Lewisham Council to build a new leisure centre in Forest Hill, South London.

Work will start on the Roberts Limbrick Architects-designed facility in January, which will replace the existing Forest Hill pools and feature a 25m main pool.

A 16.7m learner pool; a fitness gym; two studios; a community room; and a café will also form part of the centre – the fourth leisure scheme to be approved by the council in recent years.

The development proposals will also see the Victorian facade of Forest Hill Pools retained as part of the scheme, which is also set to include the creation of a "pocket park" and is due for completion by the end of 2012.

Lewisham Council cabinet member for community services Chris Best said: "The final design was very much the result of a strong working relationship between the architects and the stakeholder group set up to liaise with residents."

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Commercial

Private equity firm acquires Vue cinemas

Vue Entertainments has been bought out in a deal believed to be worth around £450m

Private equity firm Doughty Hanson has announced that it is to acquire cinema operator Vue Entertainment in a deal believed to be worth around £450m.

The business is currently owned by Cavenish Square Partners; hedge fund Och-Ziff and the management team, which includes founder Tim Richards.

Under the terms of the deal, the existing management team will reinvest in the transaction, which aims to boost Vue's digital projection roll-out plans.

Vue – launched in 2003 – is currently the third largest cinema operator in the UK with 678 screens across 68 cinemas, along with two overseas sites – Dublin, Ireland, and SBC Faro Algarve, Portugal.

Doughty Hanson's Julian Huxtable said: "Vue Entertainment is a great company led by an exceptional, highly experienced management team which has created a strong market position for the company with an exciting future ahead."

Ministry of Sound tie-up for Luminar

Luminar aims to lure back the punters

Luminar has revealed that it has teamed up with Ministry of Sound as part of a bid to reverse a decline in revenue.

In the six months to the end of August 2010, the nightclub operator reported a 20.8 per cent decrease in overall sales, when compared with the same period the previous year.

Meanwhile, admission revenue and footfall decreased by 26.5 per cent and 19 per cent respectively across the group's 76 venues against the first half of 2009.

Luminar said that the new partnership with Ministry of Sound will deliver events through the Hed Kandi and Dance Nation brands alongside its "mainstream" offer.

The group has also announced that it had signed up live acts, such as Calvin Harris and Basshunter, to perform in its clubs as part of an operational change.

SMG Europe to operate York arts venue

York's Barbican Auditorium is to receive a new lease of life after SMG Europe signed a 30-year agreement with the City of York (CYC) Council to operate the venue.

It is hoped the deal between the local authority and the entertainment operator will secure the centre's long-term future.

The 1,500-seat Barbican Auditorium is now poised to undergo an extensive £2m refurbishment, which is designed to provide improved public and back-of-house areas and a restaurant.

CYC assistant director for communities and culture Charlie Croft said: "It is great that we now have a firm plan for the Barbican to reopen in May this year, with improved facilities and an exciting programme for everyone in York."

SMG Europe theatres director Nick Reed added: "To be re-opening and improving a major venue like the Barbican when the rest of the UK cultural sector is bracing itself for cuts and closures is a remarkable story for York."

The new-look G Casino Birmingham

New £1.2m G Casino unveiled in Birmingham

G Casino has officially opened its new Birmingham venue, following a £1.2m refurbishment of the existing Grosvenor Casino on Broad Street.

The 20,819sq ft (1,934sq m) casino is located at the Fiveways Leisure Complex and features 15 gaming tables and a 100-seat poker room.

Private tuition will be available for poker novices, while the room will be capable of hosting regular tournaments. The Gallery, a 46-seat restaurant, completes the facility line-up.

G Casino Birmingham general manager Adrian Frost said: "We're working hard to remove some of those barriers often associated with casinos and believe the new-look venue offers a fun and friendly atmosphere."

armitage venesta
Washroom Systems

Oxygen Breathes Life Into Refurbishment

Armitage Venesta's stunning new range, Oxygen, has been used in the transformation of Scotland's largest fire station. As flagship for the service north of the border, Strathclyde Fire & Rescue, based in Hamilton, has cause to welcome many high profile guests - the first of whom being Fergus Ewing MSP who officially re-opened the station following extensive refurbishment of its reception area.

Oxygen in opaque black glass with IPS *Evolve* pre-plumbed panelling was chosen to complete the stylish, contemporary design of the new reception floor. Launched earlier last year, Oxygen, a prestigious new range by Armitage Venesta was developed using the latest technology and premium materials. Oxygen is available in a choice of beautiful, FSC certified real wood veneers, opaque glass in black or white, or Laminate which benefits from the full choice of Armitage Venesta's extensive colour palette.

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Hospitality

Sahara buys Mayfair hotel

India-based conglomerate Sahara India Pariwar has bought the iconic Grosvenor House Hotel in Mayfair, London from The Royal Bank of Scotland Group for a reported £470m.

Grosvenor House Hotel is currently run by Marriott International under the JW Marriott brand, but is now to be jointly run alongside Sahara India Pariwar.

In addition to the 420 bedrooms and 74 suites, the property features 4,000sq m (43,056sq ft) of meeting space and the Great Room banqueting space.

Sahara India Pariwar chair Subrata Roy Sahara said: "This acquisition is a part of the major expansion plans of the group. In addition to the acquisition of Grosvenor House, London will be the gateway for Sahara to introduce some of its new business ventures."

London's iconic Grosvenor House Hotel

It has also been reported that Sahara India Pariwar is planning to add a restaurant, a nightclub, a spa and a swimming pool to the hotel's facilities.

Green light for £55m Angus golf resort

Outline planning permission has been granted for the development of a new £55m golf, hotel and residential development near Broughty Ferry, Dundee.

Local entrepreneur Mike Forbes' proposals for The Angus have been given the green light by planners at Angus Council.

An international competition-standard, 18-hole championship golf course designed by Darren Clarke is at the heart of the scheme, along with a hotel and spa.

Forbes said: "We have worked tirelessly with officials to ensure that we met all of the vital considerations which were raised following the initial launch of our proposals. Now, we will work just as hard to attract a leading international operator to take The Angus forward, with our focus on specialists in the United States, China and South Africa."

An artist's impression of the 11th Hole

Study: '53,700 new hotel rooms' for the UK

The UK's hotel industry is continuing to expand despite the recession, with more than 10,400 rooms opening in 2010 and a further 43,000 planned for 2011-15.

According to the *British Hospitality: Trends and Developments* report from the British Hospitality Association (BHA), the budget sector is poised to continue its expansion with more than 5,300 new rooms added in 2010 – with new brands such as Citizen M, H10 and Tunes opening their first properties in the UK.

In 2001, there were 50,000 budget rooms, a figure which has risen to 112,600 in 2010. Meanwhile, the luxury segment is proving to be the most robust.

Kathryn Pretzel-Shiels, head of the UK's hotel, restaurant and travel industries for American Express said: "Spending by card in the UK increased steadily in 2010, far exceeding growth rates in other European cities. This was largely driven by luxury hotels, with spending in mid-scale hotels growing at a slower rate."

Marcus Wareing to open St Pancras restaurant

Marcus Wareing is to open a new restaurant at the St Pancras Renaissance Hotel London in Kings Cross.

The 120-cover, 6,700sq ft (622sq m) Gilbert Scott brasserie – named after the architect behind the 1873 design of the St Pancras building – will be the chef's second London eatery and is due to open its doors on 5 May.

David Coffer Lyons acted on behalf of Manhattan Loft Corporation, which is leading the St Pancras project.

Wareing said: "The minute I set foot in St Pancras, I just knew it was for me; the building is breathtaking and has an amazing sense of time and place that I had to be a part of. This is not another Marcus Wareing at the Berkeley, there can only be one, it is a very different venture."

18 per cent of women are in senior roles

Female turnover costs industry £2.8bn

Around 310,000 female workers are leaving the hospitality, leisure, travel and tourism industry each year, costing businesses £2.8bn in replacement recruitment and initial training.

The claim is made in a report unveiled by sector skills council People 1st. Figures from the *Women 1st - the case for change: Women working in hospitality, leisure, travel and tourism* report show that the percentage of women working in the sector has continually declined over the past six years – from 61 per cent in 2004-5 to 56 per cent in 2010.

Furthermore, on average, a quarter of the male workforce is employed in management or senior positions, compared with 18 percent of females.

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Property

£10m scheme for The Cube

Sanguine Hospitality has secured a £10m deal to develop a new four-star hotel, restaurant and a luxury health club and spa at The Cube building in Birmingham.

Michelin-starred chef Marco Pierre White will join forces with the group to open a skyline eatery on the 25th floor offering panoramic views of the city.

The 23rd and 24th floors will become a 52-bedroom Hotel Indigo, while The Club and Spa will occupy the bottom two floors. A wet area comprising a hydrotherapy pool, five thermal treatment rooms; a gym; and a ten-room spa will be among the facilities at The Club and Spa.

Sanguine's in-house construction firm, Denizen Contracts, is due to start work in January in order to deliver the phased fit-out of the development, which is due for completion in August 2011.

Sanguine secured a £10m deal for The Cube

The project will be Sanguine's first venture in the West Midlands and has been financed by Downing Corporate Finance and Lloyds TSB Corporate Markets.

Green light for Preston scheme

A new cinema, cafés and bars are to be created as part of a multi-million pound scheme in Preston, Lancashire, following approval from the communities secretary Eric Pickles.

Preston City Council (PCC), which is working alongside developer Lend Lease on the Tithebarn development, has welcomed the government's decision.

PCC leader Ken Hudson said: "Now that we have planning permission, we can continue to work closely with our partners to decide what the next stages are.

"With our partners Lend Lease and Lancashire County Council we can now start to take Tithebarn forward with renewed energy and enthusiasm."

A new bus station, retail units, offices and homes form part of the scheme, along with a revamp of Preston Markets.

The Tithebarn scheme has been approved

TWC appoints Southwater contractor

Telford and Wrekin Council (TWC) has appointed McPhillips (Wellington) as its main contractor for the £250m regeneration of Southwater.

Over the coming year, a number of sites will be prepared ahead of the main build phase of the scheme, which will include a leisure hub with space for a leisure pool and a multi-screen cinema.

TWC is working in partnership with the Southwater Event Group and the Homes and Communities Agency on the scheme, the latter of which has contributed £9.5m towards the cost of the development.

MACE, Barton Willmore and civil engineers Jacobs are working alongisde the council on the scheme, which also includes office and residential units and a new community medical facility.

Tom Gray, chief executive officer of Southwater Event Group, said: "The council's mixed use civic offices, which will include bars and restaurants, will help to create a thriving night time economy."

Sittingbourne revamp proposals submitted

New restaurants and a cinema are at the heart of new regeneration plans for Sittingbourne, Kent, which have been submitted to the local authority.

Spenhill Regeneration – a subsidiary of Tesco – has lodged the plans with Swale Borough Council for the scheme, which will also include a hotel and leisure space.

The proposals have been shaped by a series of consultations over the last five years, which have found a demand for new restaurants and leisure facilities to revitalise the town.

Tesco's Jonathan Simpson said of the proposals: "Our plans will give a real boost to the town centre, providing the improved shopping facilities and better public spaces that local residents have told us they want."

Doncaster's new cultural quarter

Work starts on Doncaster cultural quarter scheme

Muse Developments has started work on the first phase of a new multi-million pound Civic and Cultural Quarter for Doncaster, South Yorkshire.

New civic offices and a one-stop shop for the council's customer services are set to comprise Stage One of the £300m regeneration scheme, which was given the green light by councillors in September 2010.

Meanwhile, work on a new £22.3m performance venue, the first public square and other first phase elements will get underway early this year.

Funding for the project has been provided by the European Union through the European Regional Development Fund's allocation for the Yorkshire and Humber area.

Health & Fitness

Afan Lido plans unveiled

Plans for a new £13.6m multi-purpose leisure facility to replace the fire-damaged Afan Lido venue in Port Talbot have been unveiled by the local authority.

Neath Port Talbot Council (NPTC) confirmed that the leisure part of the proposed complex is to be run in partnership with Celtic Community Leisure.

Facilities at the Holder Mathias Architects-designed centre will include a 25m swimming pool; a learner pool; a sports hall; a fitness suite; and a dance studio, along with a ground floor café.

A community hub – separated from the leisure part by a glass walkway atrium – will feature a library; an ICT training room; a youth facility; and a crèche.

The scheme is to be funded using capital contributions from NPTC, efficiency savings and an insurance payment from the Afan Lido fire, along with a potential European Union grant award.

NPTC aims to start work on the new leisure complex in late 2011 or early 2012.

The entrance to the proposed new facility

Leisure trust to launch budget chain

Leisure trust Kirklees Active Leisure (KAL), which operates community leisure services in West Yorkshire, is planning to open two budget gyms in the Huddersfield and Dewsbury areas.

The non-profit KAL currently runs 11 facilities on behalf of the local council and is looking to become the first budget gym operator in the region.

KAL's plans are to be developed further over the coming months, with the Huddersfield site aiming for a late summer 2011 opening. Each gym will provide a minimum of 120 stations, with equipment to be provided by Technogym.

The trust is poised to open two budget clubs

KAL chair David Heddon, said: "Budget gyms are a way of expanding and reaching those who want to focus on using fitness equipment and attending classes at a reasonable price. "

The Third Space to roll out clubs across London

Independent health club operator The Third Space is planning to open a number of new clubs in the capital.

In an interview with *Health Club Management* (see p50 for the reprinted interview) CEO Eric Dunmore revealed that the chain was looking to implement its roll out plans that were delayed by the downturn.

"When we launched the management buyout (in August 2007), the backing was for a 'five clubs in five years' plan, The recession affected everybody, ourselves included, so in my mind that five-year plan starts now," said Dunmore.

The first new club to open this year will be in Piccadilly, London – a 15,000sq ft (1,400sq m) club that will be located at the Marylebone Hotel.

David Lloyd Leisure unveils new Exeter club

David Lloyd Leisure (DLL) has officially launched its new £11m Sandy Park health and fitness club in Exeter.

The facility includes a 12,900sq ft (1,198sq m) gymnasium equipped with cv and resistance machines, free weights and Power Plates.

Three indoor and five outdoor tennis courts; indoor and outdoor swimming pools; and an area for children's activities are also on offer. A full programme of classes will be offered.

The Exeter development is the first club opening for the group, following the merger between David Lloyd Leisure and Next Generation.

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Attractions

Stonehenge nets £10m HLF funding

Plans to enhance the visitor experience at Stonehenge have received a £10m boost from the Heritage Lottery Fund (HLF).

The Lottery award is desgned to help plug a funding shortfall for the development of a new £27m visitor centre at the prehistoric monument, after the government announced in June that it would be withdrawing a £10m contribution as part of efforts to reduce the national deficit.

The proposed visitor centre, which is set to feature enhanced exhibition and education space, is to be constructed at Airman's Corner – 1.5 miles (2.4km) west of the Wiltshire World Heritage Site.

IMAGE: ENGLISH HERITAGE

The proposed new £27m visitor centre to be built at the prehistoric Wiltshire monument

HLF chair Dame Jenny Abramsky said of the award: "Stonehenge demonstrates the vital role heritage plays within the UK's tourism industry as well as being a great example of our fascinating history. The money will help ensure the magic of that special place will be retained and looked after into the future."

Arts Council to take on museums role

Arts Council England (ACE) has confirmed that it has agreed to take over a number of the Museums, Libraries and Archives Council's (MLA) main functions.

The Renaissance in the Regions programme; the development of regional museums; and cultural property functions will now form part of ACE's remit.

ACE will not be taking on the MLA's strategic archives role but will receive £46m additional funding to help deliver its new responsibilities.

It is expected that functions will move to ACE by the end of 2011, with the MLA's closure due to take place by March 2012.

ACE has agreed to take on key MLA roles

ACE chair Dame Liz Forgan said: "This is a unique opportunity to join together the historic and the contemporary and to do away with the artificial divide caused by different funding streams."

'Sustainable' visitor centre for Loch Ness

Cameron Webster Architects (CWA) has unveiled its latest plans for a 'sustainable' visitor centre at Loch Ness, Scotland.

The Glasgow-based firm has drawn up proposals as part of the £2.5m Jacobite Discovery Project, a scheme by Inverness-based Jacobite Cruises which also include a new harbour for Loch Ness.

Designed to feature a "fully sustainable set of green credentials", the proposed Jacobite visitor centre will be heated and cooled using water from Loch Ness.

CWA partner Robin Webster said: "There are many eco-friendly features within the development and the location of the Discovery Project lends itself excellently to these. The architectural concept fits very carefully with the landscape and the natural features of the site."

Rod Michie, director of the Jacobite Discovery Project, added: "We are looking forward to having brand new facilities where visitors can really make the most of beautiful Loch Ness. "

COURTESY: ADRIAN WYNNE, CARUSO ST JOHN; COPYRIGHT TATE

How the Members Lounge is to appear

February start for £45m Tate Britain project

Tate has announced that work on a £45m scheme to transform its original London gallery – Tate Britain – is to get underway in February 2011.

Designed to conserve the Sidney Smith-designed building, the scheme will also entail an upgrade of the Grade II*-listed attraction's galleries.

Caruso St John Architects' plans include the reconstruction of nine galleries in the southern part of the building and the revamp of its main entrance on Millbank.

The River Room – formerly a watercolour gallery divided into three offices – will return to public use as a single room, while new learning spaces and a café will also be created. Work is to be completed in 2013.

Spa & Wellness

Waldorf Astoria spa to open in 2011

The Ability Group led the design of the new Waldorf Astoria property at London's Syon Park

The new 137-bedroom London Syon Park, a Waldorf Astoria hotel, is due to open its doors to the public in early 2011.

The property will include a luxury spa called Kallima, which is named after the lepidopteran that transforms from a leaf-like insect to a spectacular butterfly.

Facilities at the spa will include 11 treatment rooms – one of which is a double VIP suite; a hydrotherapy suite; Vichy shower; a rest and relaxation space; a nail spa; indoor swimming pool; spa pool; sauna and steamroom; and a health club.

There are also plans to enter into an exclusive agreement with celebrity cosmetic surgeon Alex Karidis to offer guests discreet consultations within the spa.

The Ability Group has led the design of the Hilton Worldwide-operated hotel. Independent interior design consultants have also worked on the property, while the bar and restaurant concepts have been created by the Gorgeous Group.

£220k expansion for public sector spa

Inside Spa is to undergo a £220,000 revamp

Pendle Leisure Trust (PLT) has teamed up with Alliance Leisure in order to deliver a £220,000 extension of Inside Spa.

The scheme will form part of a wider £3m overhaul of Pendle Wavelengths. Inside Spa was one of the UK's first public sector spas when it opened in 2007.

A relaxation room for larger groups and a further four treatment rooms will be built as part of the project, while the reception area is set to become a manicure and pedicure bar.

PLT chief executive officer Phil Storey said: "The spa is now in its fourth year of operation and the demand is incredible.

"Between 2008-09 and 2009-10, we tracked a 30 per cent increase in public spend within our facilities. This financial year alone we have already witnessed a further 18 per cent growth."

Bannatyne Group opens day spa in Kent

Bannatyne now runs more than 30 spas

The Bannatyne Group has opened a £350,000 wellbeing spa in Kent.

The Broadstairs spa facility is the 31st in the Bannatyne Spa chain and is an extension to the existing Bannatyne's Health Club at Westwood Farm.

Open both to members and non-members of the health club, the new single-storey spa includes four therapy rooms, a dual treatment room for couples, a relaxation room and a make up station.

Treatments at the spa are supplied by Elemis and include lava shell massages, facials, detox regimes and Ionithermie, which helps to combat cellulite.

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Public Sector

Government unveils radical health plans

IMAGE: DEPARTMENT OF HEALTH

Andrew Lansley is proposing to transfer more health sector powers to local authorities

Health secretary Andrew Lansley has announced plans for a 'radical' new public health service to encourage people in England to adopt healthier lifestyles.

Public Health England will see more power handed over to local authorities, with ring-fenced funding from within the overall NHS budget to be made available.

Around £4bn is to be invested by the Department of Health in delivering the service, which will also include industry, charities and other departments.

In his White Paper, Lansley said the approach would incorporate projects such as the new £135m Olympic legacy participation programme and the protection of green spaces. Government plans also include ensuring communities are designed for 'active ageing'.

Lansley said: "People's health and well-being will be at the heart of everything local councils do. It's nonsense to think that health can be tackled on its own."

HLF announces £45m budget increase

More historic buildings are set to benefit

An additional £45m is to be made available by the Heritage Lottery Fund (HLF) for new grants in 2011-12.

The funding agency has confirmed that its overall budget for the next financial year will be £250m, with a full business plan to be confirmed in spring 2011.

An increase in the share of National Lottery funding that is made available for heritage, which was approved by the House of Lords on 23 November, has helped increase the HLF budget.

From the additional funds, £17m is to be allocated to four programmes: The Townscape Heritage Initiative will net an extra £1m; repair grants for places of worship in England will be increased by £4m; and 'Your Heritage' will secure a further £5m. Landscape Partnerships will benefit from an extra £7m.

New London promotion agency unveiled

Think London, Visit London and Study London are to be brought together in a new single promotion agency for the capital launched by mayor Boris Johnson.

Promote London has been established to ensure a more co-ordinated and strategic approach to promoting the city overseas and is in line to receive a minimum of £14m a year over a four-year period.

Dame Judith Mayhew, chair of the New West End Company, has been appointed interim chair of the new agency.

Johnson said: "[Promote London's] creation is the fruit of detailed negotiations with central government, which are nearing their conclusion, and shows that another key element of my vision for London has been secured."

Tourism Alliance chair Ken Robinson welcomed the news. He added: "It is essential to London – and, indeed, the UK as a whole – that there is a distinct and strong tourism marketing and development organisation for London."

Hunt aims to boost private investment

Hunt calls on private sector to fund UK arts

Culture secretary Jeremy Hunt has set aside £80m for match funding schemes as part of government plans to increase the number of philanthropic donations to arts groups.

Revealing a ten-point plan for the future of funding, Hunt aims to to create "a new generation of philanthropists" and increase the private sector's share in supporting the arts.

"Public funding of the arts will always continue. But we must help our arts organisations develop more mixed funding models," he said.

The ten-point plan includes the £80m pot of gold, which the government hopes will help to lever in more than £160m, which would be invested in arts via match funding.

Parks & Countryside

Lottery grants for four UK park projects

The Green in Allerdale is one of the four locations to secure confirmed Lottery funding

Four historic UK parks are to undergo major restoration work after National Lottery funding support was confirmed.

Wandle Park in Croydon, London, and The Green in Allerdale, Cumbria, are to receive a share of £3.1m from the Heritage Lottery Fund (HLF) and Big Lottery Fund (BIG). Meanwhile, Swansea's Cwmdonkin Park and Aberdeen's Duthie Park will benefit from a separate £3.3m investment by the HLF.

In addition to the confirmed grants, 11 other UK parks will receive a share of £900,000 of initial HLF/BIG support after being awarded first round passes.

HLF chief executive Carole Souter said: "A local park is a vital resource for surrounding communities and can often be people's only available green space.

"We are absolutely committed to supporting historic parks across the UK and by doing so protecting the wonderful legacy that was left to us by the Victorians."

DEFRA launches Big Tree Plant initiative

More trees are to be planted in urban spaces

The Department for Environment, Food and Rural Affairs (DEFRA) has launched The Big Tree Plant to plant one million extra trees in urban areas across England.

The new four-year, £4m programme will be delivered in partnership with a number of organisations, including The Tree Council, the Woodland Trust, Trees for Cities, England's Community Forests and the Forestry Commission.

It is the first government-led tree planting initiative to be launched since the 1970s and aims to help tackle a recent decline in the number of trees in urban areas with the help of grant funding.

The new campaign is included in the department's Structural Reform Plan and Business Plan and will provide support to community groups looking to create or expand tree planting programmes.

Dorset visitor centre proposals submitted

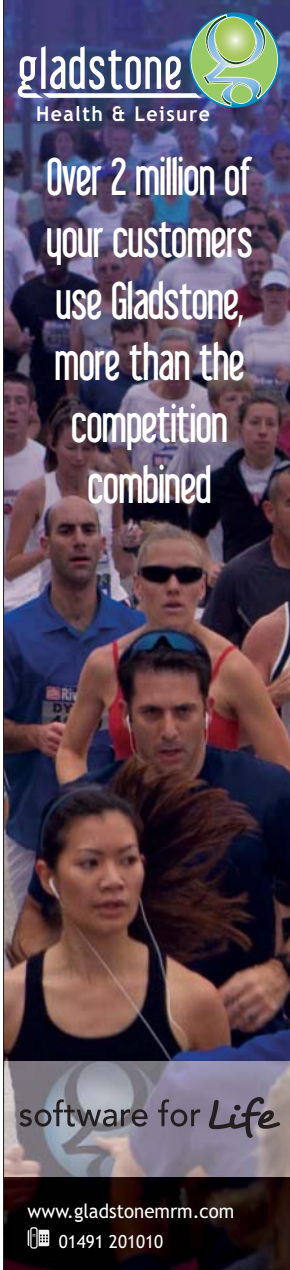
The planned Hengistbury Head centre

Plans have been submitted for a new eco-friendly visitor and education centre at Hengistbury Head Nature Reserve near Bournemouth, Dorset.

The proposed £1m facility is to incorporate an exhibition area for archaeology, ecology and geology; a space for community use; and outdoor learning areas.

Work space for centre staff; access for disabled visitors; and a retail outlet similar to a National Trust shop are also mooted as part of the scheme.

Developer contributions will provide £300,000 towards the cost of the development, while a second-round bid for Heritage Lottery Fund support will be submitted in February.



Design news

From Weston Grand Pier to the new Robert Burns Museum, we look at what's new

Project	The Corinthia Hotel London
Design	GA Design International & David Collins
Location	London, UK

New luxury hotel for London

A new five-star hotel overlooking Trafalgar Square and the River Thames in London is planned for spring 2011.

The Corinthia Hotel London will feature 294 guest rooms, including 45 suites. The two-bedroom Royal Suite will be the largest in London at 470sq m (5,000 sq ft).

The hotel will feature a 2,140sq m ESPA spa set over four floors, a seafood restaurant and a British restaurant.

The interior design is led by GA Design International, with David Collins creating the hotel's bar and seafood restaurant.

The Corintha Hotel is the company's ninth property

The pier was originally opened in 1904

Project	Weston Grand Pier
Design	Angus Meek Architects
Location	Weston-super-Mare UK

Weston Grand Pier reopens

Weston-super-Mare's 106-year-old Grand Pier reopened to the public in October, several months late and more than two years after it was damaged in a fire.

Bristol-based architect Angus Meek is behind the design of the new-look attraction, which has undergone a £35m overhaul led by John Sisk and Son.

A number of rides supplied by Stroud-based Gravitron and a 90m (295.3ft) observation tower looking over the Severn Estuary are among the pier's new attractions.

IMAGE: ©MIKE SCHMUCKER, POPULOUS & BLIP

The stadium was designed in the shape of an African pot

Project	Soccer City National Stadium
Design	Populous & Boogertman and Partners
Location	Johannesburg, South Africa

Soccer City Stadium wins architecture prize

Soccer City National Stadium in Johannesburg, South Africa, designed by Populous and Boogertman and Partners, won the World's Best Sport Building award at the World Architecture Festival Awards in Barcelona in November.

The judges said: "The Soccer City Stadium makes a strong connection with its place in history, the game and the future of this area. It is an example of a building ... giving an exciting future to an otherwise run down area, becoming instantly recognisable as the face of the South African World Cup."

IMAGE: ©VINCENT CALLEBAUT ARCHITECTURES - WWW.VINCENT.CALLEBAUT.ORG

The planted roof will help to keep the building cool in summer and warm in winter

Project	Green Wave
Design	Vincent Callebaut Architectures
Location	Royat, France

Thermal pools for Royat

Two new thermal rehabilitation swimming pools, complete with a planted roof, are to be built in the spa town of Royat in central France.

Vincent Callebaut Architectures in association with Frederic Magnien Architect have revealed their plans for Green Wave, which focuses on the construction of a 'planted wave' covering the pool hall under its curve.

At the eastern part of the planned hall, there will be a fountain pool offering a view of the sky. The bioclimatic planted roof has been designed to absorb heat in winter and to naturally ventilate the hall in summer.

Royat's thermal springs have been popular for 'cures' since Roman times.

IMAGE: RSC/PETER COOK

The theatre opened on time and on budget

The museum replaces the Burns National Heritage Park

Project	Royal Shakespeare Theatre
Design	Bennetts Associates
Location	Stratford-upon-Avon, UK

RSC unveils new £112.8m Stratford home

The Royal Shakespeare Company (RSC) has reopened its new theatre in Stratford-upon-Avon following a four year, £112.8m development programme.

At the centre of the new-look Royal Shakespeare Theatre (RST) is a 1,040-seat main auditorium and a thrust stage, which has halved the distance of the furthest seat from the stage to 15m (49ft). The development also included the creation of a Rooftop Restaurant; a Riverside Café and Terrace; and a new Colonnade to link the RST with the Swan Theatre.

Project	Robert Burns Birthplace Museum
Design	Simpson & Brown Architects
Location	Alloway, Ayrshire, Scotland

Robert Burns Birthplace Museum opens

The National Trust for Scotland's new £21m Robert Burns Birthplace Museum opened in December in Alloway, Ayrshire.

The museum showcases different aspects of Burns' life including his family and relationships and his political beliefs. It features 5,000 historic artefacts, including original manuscripts and a range of memorabilia, as well as audio visual interpretations of four Robert Burns classic poems.

The new single-storey building has a timber frame from locally-sourced Douglas fir and a wave-shaped turf roof. ●

ANN MURRAY

More than 30 years after The Sanctuary spa launched in Covent Garden, the brand is rolling out with a series of high street spas. We speak to managing director Ann Murray about the plans for the women's only spa brand

Why do you think The Sanctuary has been so successful?
We have a unique brand. The spa was the UK's first women-only day spa. It launched in 1977 and has evolved over the years to provide the ultimate retreat for women. We welcome 64,000 women through our doors each year and are therefore able to talk to them directly about their needs and concerns. This gives us the opportunity to specifically target the areas our customers tell us are important to them.

The Sanctuary product range, which was launched in 1998, has also helped us to increase our brand awareness and has been a huge success – it is currently Boots' second biggest selling beauty range.

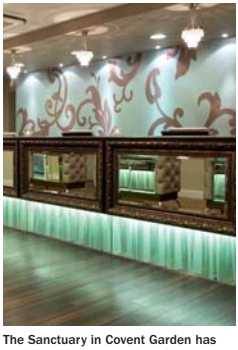
> **"We have worked hard to create an environment which our guests love. We have fans across the country who could only come to the spa on rare occasions as they live outside London"**

How has The Sanctuary changed since its launch?
When The Sanctuary first launched, it was known for providing respite for dancers of the Royal Ballet. Over the years the brand has evolved to provide more experiential facilities, including our much copied Sleep Retreat. We have continued to develop our Sanctuary signature treatments for both body and face. Our product range has also continued to develop and improve, and it offers women the possibility of spa-type treatments in the home.

When did you join The Sanctuary?
I joined in June 2010 as managing director. I was attracted to the job because it's a hugely challenging role in a hugely exciting industry. The Sanctuary was one of the UK's first day spas; today it is still one of the largest in terms of its facilities and the number of guests through the doors.

We have exciting growth plans for the brand and it was the perfect time to take on this role.

Why has The Sanctuary decided to roll out now?
We have a much loved and trusted brand within The Sanctuary and we want to be able to bring this magic to women across the country. With the backing of PZ Cussons, which acquired us in 2008, this is now possible and the



The Sanctuary in Covent Garden has been brought up to date

Redesigning The Sanctuary

In June 2010 interior design company Charles Leon Associates completed a refurbishment of The Sanctuary in Covent Garden, London. The spa's reception, lounge and dressing room, restaurant and Koi Carp Lounge were all restyled, transforming the previously dated interiors.

Charles Leon Associates were given a brief to move The Sanctuary away from its underlying Oriental theme towards a more English, eclectic style. Throughout the spa an oversized Baroque pattern has been used, from wallpapers and fabrics to tiling and fretwork screens.

In the reception area, upholstered pouf cabinets with mirrored doors and crystal doorknobs filter guests towards long mirrored reception desks. The lounge needed to act as a space for socialising as well as private relaxation and even sleeping. Charles Leon Associates zoned the space into three areas – a café-style space with armchairs and coffee tables, a relaxation area with low lighting and velvet seating, and a third area with day-bed sofas for guests to recline and sleep on.

Charles Leon Associates also designed the new day spas.

The recently-opened Sanctuary Spa Cambridge (above) features five treatment rooms, a nail bar and the Lavender Lounge relaxation room (right)

nationwide roll-out is very much a part of our growth plans.

We're really proud of the Day Spa in Covent Garden. We have fans across the country who use our products, but can only come to the spa on rare occasions because they live outside London. It's exciting that we can now open up high street spas in other locations around the country.

The first boutique spa opened in Cambridge in August 2010. The Sanctuary Spa Richmond opened in September, and the Bristol spa opened in December.

How did you choose the locations for The Sanctuary's first three boutique spas?

Cambridge was the perfect first location as it's outside London, but close enough for us to manage properly. The demographics of Cambridge and the surrounding areas are highly complementary to The Sanctuary brand.

With Richmond and Bristol it was a question of targeting the areas we wanted to be in, with regards to profile and customer demographics, and then securing the right site.

What facilities do the new spas offer?

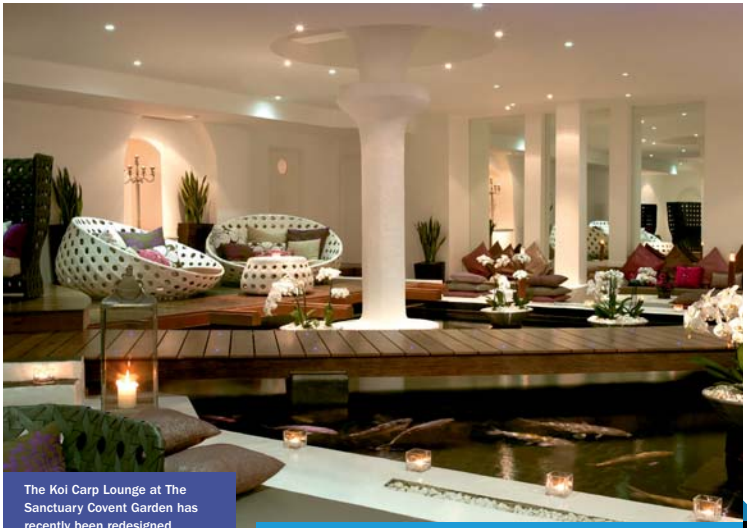
The new boutique spas feature a minimum of five treatment rooms, offering guests the greatest Sanctuary treatments, as well as a relaxation area called The Lavender Lounge. They also feature a stylish Champagne Manicure Bar and an interactive retail area with tester bar where customers can try our products and speak to our expert spa consultants and therapists while they shop. The Sanctuary Spa's USP has always been about offering more than pampering treatments – we aim to give a full and unique experience where guests emerge feeling relaxed and revitalised.

Will the boutique spas share The Sanctuary's central philosophy?

The Sanctuary Covent Garden is all about 'the experience' and about providing time out for women. It is also an admissions-based spa, meaning guests pay an admission fee and then spend a day or evening relaxing, enjoying treatments and dining with us.The new model has no admission fee, as customers come in for treatments with relaxation time attached at either end. It's really important to us that any new spa we open carries the same magic as the day spa in Covent Garden and that we continue with the time out philosophy through our boutique high street spas.

What treatments do the boutique spas offer?

We're offering some of the most popular signature treatments from our Covent Garden menu along with innovative



The Koi Carp Lounge at The Sanctuary Covent Garden has recently been redesigned

"Bringing The Sanctuary to life on a reduced scale is challenging, however our staff are so passionate that this challenge has been minimised"

new treatments such as the 'Lava Shell Massage'.

Due to the success of our Covent Garden drop in Skin Spa, we'll also be introducing new results-driven treatments with a Medi Spa line up including botox and fillers.

What are your longer-term roll out plans?
We are looking at a roll out over the next three years of between nine and 12 spa openings.

What are you looking for in potential cities/sites?
It's a question of the right site within the right city in terms of demographics and customer profile.

We would consider going outside of the UK, but we'd want to ensure we got our UK model perfect before doing so.

What aspect of The Sanctuary are you proudest of?
The passion we bring across The Sanctuary to what we provide – whether in terms of our spa services or our products.

What is the biggest issue for The Sanctuary at the moment?
Bringing The Sanctuary to life on a reduced scale is challenging, however our staff are so passionate that this challenge has been minimised.

What emerging spa trends are you seeing?
I see a move towards results-driven treatments, particularly in skincare, for example IPL, Cellu M6 and Endermologie.

What drives you?
The fact that we are helping women everywhere – providing them their own sanctuary – and of course the passion of the team of women that work for the brand.

How is the recession affecting The Sanctuary?
Like any business we've had to ensure that our brand is relevant and that the time and money invested in us by the consumer gives them back more than they anticipated. We continue to provide exceptional standards of treatment and service and a sanctuary away from life's pressures, and so I think we're still perceived as a spend that gives value for money. Our product ranges continue to be extremely successful during the recession as women still aspire to a little affordable luxury at home and our products are priced reasonably while offering spa quality results.

What is the best part of your job?
Working with a team that is truly passionate about bringing our brand values to life. I also love sampling new product ranges and treatments – that's a real bonus of my job.

What's the best piece of advice you've ever been given?
"Smile and the world smiles with you." ●

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ROBERT COOK

After surviving the worst of the recession, Malmaisonand Hotel du Vin CEO Robert Cook is ready to grow the group again. He tells Magali Robathan more

If the last three months are anything to go by, I think we're out of the woods," says Robert Cook, chief executive of Malmaison and Hotel du Vin. "We're certainly getting good room rate growth, and the food and beverage side of things is really strong. I feel the worst has passed."

The hotel industry has had a tough couple of years, and although Malmaison and Hotel du Vin have come through the recession in pretty good shape, Cook admits it's been a rough ride. Now, however, he's cautiously optimistic, and is champing at the bit to restart the expansion that was put on hold during the downturn.

"We've got to keep growing," says Cook. "It keeps people in our business and gives them the chance to develop. I get a big kick out of opening new hotels and seeing people in our business grow. And it's important for us to go international." Cook has his sights firmly set on America – "the land of opportunity" – and is in negotiations to open Malmaisons in Paris, Venice and Rome, as well as rolling out Hotel du Vin across the UK.

Cook's whole life has been about hotels – his childhood bedroom was Room 114 at the hotel his parents ran in Aberdeenshire, and after graduating he spent three years with Holiday Inns before joining Ken McCulloch's Malmaison in 1997. When McCulloch left to launch a new hotel project in Monte Carlo, Cook left with him, before returning to Malmaison as CEO in January 2004. In October 2004 Malmaison's owners MWB bought Hotel du Vin, making Cook CEO of both brands.

"There is no other industry for me," says Cook. "I was born in a hotel, I was brought up in one. I know nothing else. I still get up every morning with fire in my belly to make Malmaison and Hotel du Vin as good as they can possibly be.

"The things that get me excited are giving the customer a good time and getting positive feedback. The worst thing ever is when you get a complaint; it's like an arrow through the heart."

> "Our look and design is very much a statement of who we are. However we're not in an industry that should be led by design. We're in an industry that should be led by hospitality and great people"

SURVIVING THE TOUGH TIMES

I last met Cook five years ago. At the time, he'd been CEO of Malmaison for 16 months and was in charge of eight Malmaisons and six Hotel du Vins.

Since then, the group has opened a further four Malmaisons and eight Hotel du Vins and the Pub du Vin concept has launched in Brighton and Birmingham. The expansion was well underway, until the recession hit and the company was forced to concentrate on cost control.

One of the first things Cook did in response to the economic downturn was to close the company's head office in London, and move its staff to Malmaison and Hotel du Vin hotels around the country. This, he says, has had unexpected benefits. "It's saved us money but also got a lot of the senior team immersing themselves in the hotels during a difficult time, which is where they needed to be," he says.

Other savings were made by closing down the development team, which was no longer needed while the expansion was put on hold, and cutting down on energy use at the hotels. "We moved our lighting onto LED systems, which saved quite a bit of money, and we also renegotiated a lot of our procurement," says Cook.

Room rates were discounted and various promotions were launched, with the result that the food and beverage side of the business actually grew during 2009 and 2010. This, says Cook, was due largely to two particularly successful promotions: The Two Thousand and Wine promotion, which allowed two people to eat in a Malmaison or Hotel du Vin for £29 and the Sunday promotion, which saw rooms offered for £10 on a Sunday night provided guests spent at least £75 on food and beverage.

"Sunday nights became as busy as Saturday nights, and people ended up spending a lot more than £75," says Cook. "I think the consumer has actually had more money in their back pocket due to interest rates and mortgage rates falling. We've benefited from that, particularly in our food and beverage.

"The recession has been tough in that we haven't developed and opened new hotels, but we've fared pretty well."

Hotel du Vin hotels feature classic interiors (main pic) while the design of Malmaison is darker and harder edged (left)

"EUROPE'S FINE BUT IT'S VERY FRAGMENTED AND YOU'RE HAVING TO JUMP FROM PLACE TO PLACE. AMERICA IS THE LAND OF OPPORTUNITY"

TIME TO GROW

"If two years ago was about cost cutting and cost control, and last year was about revenue generation and aggressive sales plans, next year is about consolidating the brands back into the marketplace efficiently, coupled with the start of growth again," says Cook.

For Hotel du Vin, the expansion plans focus on the UK. "We're looking at ways of getting new funding into the business so we can grow Hotel du Vin here," says Cook. "The hotels are still quite southern-centric and there are still lots of opportunities in the north," he continues, listing Chester, Durham, Aberdeen and perhaps a second hotel in Edinburgh among the places he'd like to see the brand in. "That's not discounting the fact we'd still like to be in more locations in the south," he says, adding that Oxford, Chichester, Malborough and Salisbury are still on his radar under the various guises of the du Vin brand.

There are also two Hotel du Vins currently under development. Work is due to start this year on the conversion of a former warehouse in Canterbury bought by the company in 2008. "It'll be a long build, as it's a wreck," says Cook, "but we'd like to think it will be open by 2013. It will have 47 bedrooms."

The company also acquired the St Andrews Golf Hotel in Fife, Scotland, in 2008, and Cook hopes that the process of converting it into a "fully blown 21 bedroom Hotel du Vin" will be completed at some point during 2011.

Hotel du Vin could also be expanded via the Pub du Vin concept, says Cook. Pub du Vin is described as a 'traditional British pub with a Hotel du Vin twist' and serves traditional pub grub and local ales. The brand is currently operating in Brighton and Birmingham. The Brighton Pub du Vin opened in 2008, and has 11 bedrooms attached, while the Birmingham Pub du Vin is a standalone pub and opened in 2009.

"I believe the du Vin brand has huge elasticity," says Cook. "Pub du Vin has worked very well for us in Brighton and I think the opportunity is there to grow the brand. I couldn't take a 45 bedroom Hotel du Vin to Chichester or Cirencester, for example, but I could take a 15 to 20 bedroom Pub du Vin to those towns." Cook is also in talks about taking the Hotel du Vin bistro out of the hotels and on to the high street, and is currently under negotiations to open a bistro in the City of London.

As for Malmaison, there isn't much scope for expansion within the UK, says Cook, although he says he would like the brand to have a bigger London presence and would buy a larger property in the capital "if the deal was right". The company is also looking at two leases in the UK – a 108 bedroom hotel in Bath and a 90 bedroom hotel in Dundee.

Cook and his team are currently negotiating various operating and management agreements in Paris, Venice and Rome, although he sees the main opportunity for growth as being in the US.

"Europe's fine, but the trouble is that it's very fragmented and you're having to jump from place to place," he says. "I think you've got to focus on one place, and America is the land of opportunity.

"We'd like to start on the east coast. We've got to be in New York – and I think we could open three Malmaisons in New York – and we want to do Boston, Miami, Chicago and Dallas."

So how much would the brand need to adapt for the US market? "I wouldn't be arrogant enough to say our brand is resilient in any market, so obviously there would have to be some adaptation," says Cook. "I don't think the look and feel of the bedrooms and public areas would have to change hugely,

but the food and beverage should be a local thing. We will adapt, but the golden thread will still be there; whether you're staying in a Malmaison in New York, Dallas or Edinburgh, you'll know you're in a Malmaison."

For Cook, the thing that really characterises Malmaison and Hotel du Vin is the staff. "Our look and design is very much a statement of who we are. However we're not in an industry that should be led by design – we're in an industry that should be led by hospitality and great people," he says. "Our people are our brand. I'm not just going to hire Americans in America, I'm going to take some of the guys that are absolutely entrenched in the Malmaison psyche over there. It'll be exciting for them and exciting for the group. We'll blend our guys with local American employees, but the DNA of the brand has to come from those that have been immersed in it."

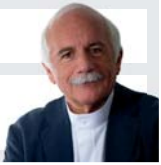
The acquisition of Hotel du Vin in 2004 seems to have strengthened the brand; as Cook puts it: "Where [Malmaison and Hotel du Vin] were vicious competitors before, they are now complementary brands, and many clients quite happily stay in either hotel." With this in mind, I ask Cook if he would consider acquiring any more hotel brands.

"I'd always like to buy more brands, but I can't think of any others that would sit with what we do currently," he says. "I wouldn't be averse to creating a new brand, when the market is right – maybe a budget-style Malmaison offering, or an upmarket style Hotel du Vin. My feeling at the moment though, is that we have two good brands. Why take our eye off the ball by doing something else?"

For Cook and his team, 2011 looks set to be a busy year.

"This year it's about adding value and growing room rates, plus the start of growth again and hopefully our first steps into Europe," he says. "We've launched a campaign about buying local food, and we're putting a lot of time into working with national farmers and food magazines. That should put our f&b right at the top where it should be. I'm really excited about it all." ●

MOSHE SAFDIE



Featuring one of the world's most expensive casinos and an infinity pool 55 storeys in the air, Singapore's $5bn Marina Bay Sands resort has been making the headlines. Architect Moshe Safdie talks us through the project

PHOTOS: TIMOTHY HURSLEY

Marina Bay Sands includes a casino with four levels of gaming (left). The three hotel towers create an icomic shape (right)

How did you get involved with the Marina Bay Sands project?

The Sands Corporation is known for creating fully integrated resorts that address a diverse set of luxury and entertainment needs. For Marina Bay Sands, they wanted an architect who would take into account Singapore's forward-thinking approach to building and city living. For me, there is always a deep sense of connection between the environment, context, and building structure. They chose me because my buildings reflect this design philosophy.

What was your brief?

We were asked to design a 800,000sq m resort featuring hotels, convention centers, shopping, a museum, a theatre and a casino on a landfill site in Singapore.

What was the inspiration for the design?

Marina Bay Sands is really more than a project – it's a microcosm of a city, and it was important to root it in Singapore's history, culture and contemporary life.

The first consideration was how to create an urban structure that would take all the parts of this complex project and weave them together. We didn't want to create a generic mall but a place with the vitality we associate with great cities.

Historic cities always had a clear hierarchy of urban place – Greek and Roman cities were organised around the Cardo Maximus [the main street in the city, running from north to sound] and Decomanus [the main road running east to west]. The street, which has always held an important function as the principal urban space of a city, provides a sense of orientation and location and acts as a focus of civic life.

For Marina Bay Sands I explored a variation on this concept. The resort is organised around a pair of principal axes – a slightly curved north/south promenade traverses the entire complex, crossed by two east/west public spines. This integrates the Waterfront Promenade with the grand multi-leveled retail arcade, combining civic space, shopping and indoor and outdoor spaces with views of the city. We created our own Cardo Maximus; a place that's vibrant and dynamic, and that transforms at night.

How did you approach the design of the outside space?

I designed the green space as a series of layered gardens that extend the tropical garden landscape from Marina City Park towards the Bayfront. Every level of the district has public open green space and generous pedestrian streets open to tropical plantings and water views.

The 2.5-acre hotel SkyPark is located at 170m (560ft) above the sea, cantilevering 66.5m (213ft) beyond the hotel towers. The park combines a public observatory, gardens, a pool and jogging paths. Shielded from the wind and planted with trees, the SkyPark celebrates the notion of the Garden City that underpins Singapore's urban design strategy.

The architecture was approved by Feng Shui consultants. Why was this important?

Given the location of Marina Bay Sands, I chose to separate the hotel into three towers in order to maintain a visual line to the sea. In my original designs for the SkyPark, I positioned it symmetrically on top of the hotel towers. Then I started playing with it, and shifted the park over a

PHOTO: AP REUTERS

The SkyPark stretches across the hotel towers and includes a 150m infinity edged pool (above), gardens and an observatory

bit to make it asymmetrical and more dynamic. We consulted with a Feng Shui master (because it was important to the people of Singapore that the consultation was a part of the process), who said the symmetry was bad Feng Shui and agreed with our decision to make it asymmetrical. When the SkyPark was placed over the top of the separate towers, it connected them as a cohesive unit.

What element of the design are you most proud of?

The success of Marina Bay Sands is owed, in large part, to its seamless integration of elements. None of the components work well independently, but together they create a complex microcosm of a city that serves as a vital public meeting place. Each element adds something to the experience of the resort as a whole.

What were the biggest challenges of this project?

The principal challenge was to reconcile the issue of the mega scale with the human scale. I wanted to create a vibrant public space, which meant that we had to weave together the various components of the project to seamlessly integrate them within the resort as a whole.

THE MARINA BAY SANDS RESORT CONSISTS OF:

- **A hotel:** 2,560 luxury rooms in three hotel towers
- **Sands SkyPark:** The 9,941sq m park that connects the three hotel towers at the top. It features a public observatory, jogging paths, gardens, restaurants, lounges and a 1,396sq m infinity pool.
- **Casino:** The atrium style casino features four levels of gaming and entertainment totalling 15,000sq m
- **Retail:** More than 74,322sq m of retail and restaurant space
- **Sands Expo and Convention Center**
- **Museum of ArtScience:** 15,000sq m with 6,000sq m of gallery space
- **Two theatres with 4,000 seats between them**
- **Crystal Pavilions housing shops and nightclubs**
- **Event Plaza:** 5,000sq m and capable of hosting 10,000 people for live performances

What does Marina Bay Sands bring to Singapore?

Marina Bay Sands enriches Singapore on a variety of levels. It provides a symbolic gateway to the city, but it also functions on a human scale. I envisage the resort becoming integral to the celebrations and urban activities of the people of Singapore.

Great cities are often identified by iconic landmarks. There is no formula for creating such a structure, but we've endeavoured to find that perfect mix of elements that defines the culture and heritage of Singapore, responds to the needs of its people, and has that right touch of magic.

How would you describe your approach to architecture?

I believe a building cannot live in isolation. It must be a natural extension of its environment, culture, and historical precedents. There must be a clear connection between the design and function of the building.

My approach to design is to take in the site, to listen to the needs of the people that will use the site, and to find design solutions that increase efficiency, respond to a variety of necessary functions, and at the same time uplift the people the structure serves. ●

Brands people love

Cadbury

The Cadbury brands have a strong heritage, with both Fry's and Cadbury Dairy Milk bars dating back to the nineteenth century. To this day, Cadbury remains close to the nation's heart and is home of the number one confectionery brand Cadbury Dairy Milk as well as many more of the nation's number one confectionery lines.

2010 was a year filled with new product developments from all the major brands, with Cadbury making some exciting developments within singles, sharing, sugar, hot beverages, mints and gum and over the counter. Highlights included the introduction of Cadbury Dairy Milk Bliss and the addition of Crunchie Rocks to the bitesize portfolio.

ARE YOU A SPOT OR A STRIPE?

The biggest campaign of last year was Spots v Stripes, with an investment of £14m in 2010. Cadbury, the Official Treat Provider to the London 2012 Olympic and Paralympic Games, kicked off a two year campaign seeing the nation split into two teams and immersed in game play in the lead up to London 2012. To support the campaign, Cadbury introduced the limited edition Challenge Bar, a cleverly designed milk chocolate and white chocolate single block intended to be shared between a Spot player and a Stripe player.

Cadbury Dairy Milk, Cadbury Crunchie, Cadbury Dairy Milk Caramel, Cadbury Wispa, Cadbury Twirl and Cadbury Double Decker also received a Spots v Stripes facelift along with multi-packs and some sharing bags.

Cadbury also introduced an on-pack promotion, entitled Challenge an Olympian. It allows consumers to take on some of Britain's top athletes by registering at www.spotsvstripes.com. Once registered, consumers are given the chance to try and beat the top scores of Olympians in fun games.

Spots vs Stripes activity will continue going strong throughout 2011 with some exciting developments in the pipeline, right up to the Olympics in 2012.

COMMITMENT TO FAIRTRADE

In July 2009, Cadbury Dairy Milk became Fairtrade certified in the UK and Ireland. Since then, Cadbury Dairy Milk Buttons and the entire Cadbury hot beverages range have also become Fairtrade. To coincide with the hot beverages accreditation, Cadbury revamped the Food Service packaging of its top selling Cadbury Instant Hot Chocolate with a modern pack re-design.

Cadbury Dairy Milk is the UK's number one confectionery brand

Cadbury and the Fairtrade Foundation believe that by working together, they can get more people in the UK to buy Fairtrade products and achieve more for this cause than they ever could individually. Cadbury has launched a host of activity around Fairtrade, including the release of the 'Big Swap Songs' album, which has been created as a free thank you to anyone who swapped to products with the FAIRTRADE mark during the fortnight. The campaign was also supported with a tv advert.

Cadbury Dairy Milk's commitment to Fairtrade is part of the Cadbury Cocoa Partnership pledge to invest £45m over 10 years to secure the sustainable future of cocoa farming in Ghana, India, South East Asia and the Caribbean. £30m will be spent in Ghana alone. The programme focuses on investing in farmer education programmes that develop best cocoa management practices, and exploring carbon reduction techniques to secure more sustainable cocoa farming.●

offer the brands people love

Whether your opportunity is in vending or counter sales, it's important to stock the best selling lines to maximise your profits.

Make sure you're stocking the best sellers.

Cadbury – the home of the No.1 confectionery brand*

Cadbury NO.1

* Cadbury Dairy Milk is the No.1 Confectionery brand, Nielsen Total confectionery impulse market MAT w/e 27th November 2010 and Nielsen Total confectionery impulse countlines MAT w/e 27th November 2010

Email marketing at fixed costs

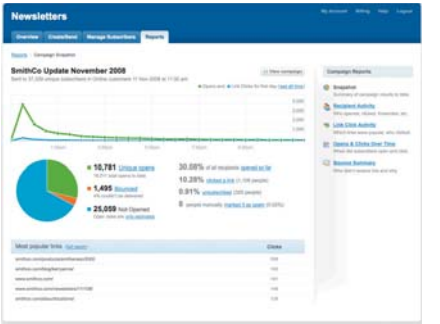
If you know who has opened your emails, what they clicked on, who bounced and who unsubscribed, you can start to understand who your audience really is, and what they are interested in.

It's this logic that drives the new email marketing suite eCampaigns Online from marketing agency, Big Wave Media.

The full service marketing agency traditionally provides marketing support in the guise of graphic design, demographics, mystery shopping and print. Yet, over recent years the agency has increased investment and offerings in technology and electronic forms of marketing.

The development of a strong web development team has led to an increased digital presence and this latest suite means the agency can truly offer a complete digital marketing offering.

eCampaigns Online is a web-based suite giving clients and users everything they need to create a successful email marketing campaign. Once it's up and running, account users can create new campaigns in glorious HTML, using pre-set templates and simple text editing tools. It requires no coding and is as easy to use as a Word document.



eCampaigns Online allows clients to personalise their email marketing

Traditional text emails only display text but HTML emails are the next step up, featuring full images and graphics, links to webpages and clickable email addresses. They offer a more aesthetic, interactive and immediate method of getting traffic to your site and a reliable call to action.

The main benefit of HTML is that simple coding already embedded in your template can track who opened your email and what they clicked on. Imagine being able to send out a newsletter with mixed articles on your latest swimming timetable, a new kids' party or your great value gym membership, and being able to review exactly who's interested in what.

Suddenly you can segment those interested in gym membership and send them a separate email with your latest 'no joining fee' promotion. You can offer a free party place to those reading up about kids' activities. Or you can plug your upcoming swim lessons to those clicking on your swim news.

By analysing and segmenting, the user can really drill down to what each person is interested in and target them appropriately. This is a form of marketing unheard of a few years ago, that offers untold ways to block out the noise and speak to each customer directly. Mass marketing through blanket coverage still has its place, but with the ability to customise each campaign to the right demographic, it's easy to see why technology is leading the way.

eCAMPAIGNSonline

Each account offers the following features:

- Create/send html e-flyers
- Full campaign analysis reporting (see who opened your email and what links they clicked on!)
- 1x bespoke branded and editable HTML template
- Create/send unlimited e-flyer campaigns
- Manage, upload and segment unlimited subscriber lists
- A/B testing, send two variants, i.e. differing subjects to see which one gets the best results
- Automatic subscriber management
- View past and present campaigns
- Quick, easy and affordable

The pricing structure is fixed for peace of mind and starts at £75 per month. This allows an unlimited number of campaigns to be sent to a subscriber database of up to 5,000 (plus all the features listed above).

The system's flexibility means that if your database grows, you can opt to progress onto a package that still includes the unlimited sending of campaigns but to a larger database.

For more information on eCampaigns Online, or to sign up please call 0845 643 2385, email info@bigwavemedia.co.uk or visit www.bigwavemedia.co.uk/contact-us

BIGWAVE MEDIA

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Whether you want to tap into the power of free publicity, reach people via email, set up a website or spread the word via Bluetooth Big Wave Media's digital marketing solutions can help you eek every penny from your marketing budget.

Email marketing

Reach your existing client base or outreach to potential customers through email. This package allows you to analyse every email sent - check who opened your email and which links they clicked on!

The ecampaigns system offers:

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- Free bespoke and editable HTML template
- Create and send unlimited e-flyers
- Manage and segment multiple subscriber lists
- Automatic subscriber management
- Quick, easy and affordable

Send unlimited e-campaigns from just £75 per month!

eCAMPAIGNSonline

SMS Marketing

Send outbound texts

- Send messages to individuals or groups
- Create multiple phonebooks
- Create templates of most commonly used messages
- Receive a Carbon Copy of every message sent out via mobile
- Detailed response analyses by campaign

Receive inbound messages

- Use keywords completely free
- Once received the system will automatically send you an email notification, add the sender to a phone book or send an automated reply to the sender

SMSonline

Public Relations tools

Want to use the power of Public Relations but unsure where to start? Our online system gives you all the knowledge, toolkits and contacts to get your brand out there.

Our unique online system gives you access to:

- PR knowledgebase and factsheets
- Research factsheets
- A library of pre-written press releases you can tailor
- A library of issue statements
- Toolkits for pre-planning your PR activity
- A bespoke media list of your regional media
- National and trade media lists
- A unique distribution system to send and store your releases

PRonline

Simple sites

High quality, low price, website start up solution. The web page management solution enables you to control your own website branding and update and optimise web page content at no additional cost.

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WHAT'S THE FUTURE FOR LOCAL AUTHORITY LEISURE?

Following the Comprehensive Spending Review in October, local authorities now know the full extent of the cuts needed. Kath Hudson speaks to the experts to find out how they are planning to safeguard leisure

Everyone looks set to feel the pinch as the coalition government aims to bring the structural deficit down to zero by the 2015/16 financial year, but what does this mean for the future of local authority leisure? Do non-statutory leisure departments still have a future?

October's Comprehensive Spending Review set out reductions in local authority funding of around 7.1 per cent each year for the next four years. Funding from quangos is set to diminish, which will have a further negative impact. Sport England received a 33 per cent cut; UK Sport 28 per cent; English Heritage 32 per cent; VisitBritain 34 per cent; and the Arts Council received a 29 per cent cut over the next four years.

Now the pressure is on for leisure services departments to communicate the benefits of leisure to those involved in health and social care sectors.

CRAIG MCATEER
Managing director
Rochdale Boroughwide Cultural Trust

There will be severe efficiency savings and I think we're facing an unprecendented closure of leisure facilities, as well as price increases. It's time to think outside the box.

But it's not all doom and gloom. There is now the opportunity to pool resources and share services. It will lead to other avenues for providing and commissioning services. Local authorities will need to look at working more closely with the third sector and voluntary community sector to explore partnerships in coaching and possible running of museums and libraries.

Going forward, there is a future in co-location. Putting services in one place drives efficiencies and customer experience and maximises space. In Rochdale, we offer health screening in libraries and pilates in the museum.

Local authorities will need to bring innovation into programmes and involve the trust sector and social enterprise. The cuts will mean that we will have to be smarter about how we offer programmes. Commissioners will need to find out exactly what local people want.

There will need to be more partnerships and the pooling of resources and budgets. Rochdale Boroughwide Cultural Trust has just won the Municipal Journal 2010 Public Private Partnership Achievement of the Year, because we do have partnerships at the highest strategic level, driven by partners on the Local Strategic Partnership Board.

In terms of trying to protect leisure and cultural services, it will become necessary to offer a cross-cutting service, which is not just about leisure, but engages with other issues, such as working with vulnerable people, children and diverse communities. We provide free entertainment and a place to meet on Friday nights for young people in Rochdale and the impact of how this helped the community, in terms of nuisance going down, was calculated to be worth hundreds of thousands of pounds.

IAN COOPER
Director
Ian Cooper Associates

In recent years we've been able to prove the value of leisure interventions to commissioners of services – especially in the health and adult social care sectors – so I think culture and sport managers are well placed to hold their own in these difficult times.

After the golden years of big budgets and high status in the 1970s and early 1980s, local authority leisure has had to keep evolving, as both budgets and status have changed. The introduction of Compulsory Competitive Tendering at the end of the 1990s heralded the creation of contractors and trusts, with many senior leisure authority managers migrating from in house teams. The 1990s saw a couple of boosts to the sector, with the National Lottery and the government's support for Local Cultural Strategies. The 2000s have been a period of continuous cost-cutting, endless performance indicators and increasing externalisation, especially to trusts. Good results in Audit Commission inspections and specific inclusion as a CPA Core Service boosted service status, but council restructures have led to a serious loss of status for leisure in many councils.

Going forward, the third sector has always recognised the value of our services and we are well placed to support the government's Big Society initiatives. Leisure departments will need to be led by a well-trained professional, working with an enthusiastic, motivated councillor, to support our services politically. Shared services and strengthened third sector partnerships will be the way forward.

More councils will move culture and sport services to Not for Profit organisations, including Community Interest Companies. There's a continuing need to undertake analyses of local need and reviews of service delivery. I think public opinion will prevent an epidemic of facility closures, but I do foresee a rationalisation of facilities and any new builds are likely to be multi-use.

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PETER MANN
Chair
ISPAL

The next few years will change the face of local authority leisure. The extent of this change will depend on the level of government grant to councils and the priority given to leisure services.

As a discretionary service, leisure is more exposed than other local authority services. While the public sector will remain at the heart of leisure, I believe we'll witness a focus away from direct provision towards a promotion, facilitating and commissioning role.

Leisure departments will need to actively promote the benefits leisure and culture bring to a community: social inclusion, general wellbeing, crime reduction and health. Although undervalued in a difficult financial climate, these can bind communities together during hard times.

There will need to be a greater emphasis on building links with local employers, to facilitate the financial and human resources potentially available via company corporate social responsibility programmes. Reviewing the objectives of these programmes may open up new opportunities for companies and councils to work together.

Another role could be the purchasing of specific outcomes, activities or time from other public sector providers, such as schools, or new community, third sector or private sector providers.

Facility rationalisation appears unavoidable and only the best located, best managed and output-driven facilities may survive the cuts. Facilities might be scaled down to a central hub site only. Where local authorities continue providing direct leisure services, they will need to demonstrate they offer value for money, through optimising income, driving down costs and continuing to develop enhanced facilities and products which reflect the quality expectations of their customers.

ISPAL and ISRM are working with the Privy Council and key stakeholders towards the potential creation of the Chartered Institute of Sport. This new institute won't solve all the challenges, but it will play a key role in helping us become more adept at managing, pioneering, facilitating, promoting and commissioning the services our communities so urgently need.

PETER HOWELLS
Leisure Connection
Operations director

Leisure Connection is working closely with our local authority partners to look at how we can support them through the tough years ahead. The next three to five years will be crucial, but we expect to come out the other side. For those authorities that have already outsourced leisure I think it will be a time to review how operators are working. For those that haven't, it could be an attractive prospect.

The biggest change in the last 20 years of local authority leisure has been the outsourcing of leisure as a non-statutory service. As a result private operators have entered the market and have invested millions in the provision of public access leisure and other cultural facilities. To the end user, the quality of the service has significantly improved. Local authority leisure centres are no longer the poor relation in the industry.

Leisure Connection is now broadening the scope of the projects we manage. We have, for example, taken on various outreach programmes for sport and the community, and manage numerous theatres, arts centres and arts outreach programmes.

For Leisure Connection, despite the spending review, it's still business as usual: focusing on our swim and gym revenue lines, managing our cost base, especially utilities, and looking at where to make investments. In terms of the future, we experience a great deal of interest in our health and community hub in Downham Leisure Centre, managed on behalf of the London Borough of Lewisham. This project houses a state of the art leisure centre and swimming pool but also an access point, numerous surgeries and practices and a popular library. This type of integrated facility could indeed become the future for new provision and services. ●

DRIVING STANDARDS

Pop star Justin Timberlake is hoping to inspire the golf industry to go green with the reopening of his eco friendly course near Memphis, Tennessee. Magali Robathan finds out what makes it so sustainable

Justin Timberlake hit his first ever golf ball on the site of what is now the Mirimichi golf resort near Memphis in Tennessee, and it was also the venue for the wedding reception of his mother and stepfather. So when the course came up for sale in 2008, Timberlake and his family immediately snapped it up.

"This [area] is where I grew up, this is home...and it always will be for me," says Timberlake. "Any time you can give back to that and get 18 holes in, it's a win-win."

The Big Creek Golf Course, as it was called when Timberlake bought it, was in a state of disrepair and was struggling financially. It needed extensive renovations and Timberlake was determined from the outset that it would be as environmentally friendly as possible. He also wanted it to be a public, rather than a private, course so that as many people in the area as possible could use it. "I was able to pose the question, is it possible for a golf course to actually be green?" said Timberlake.

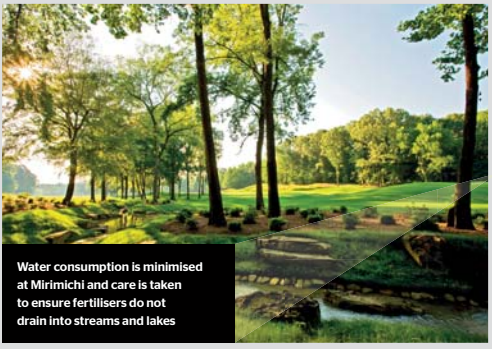
Two years on, that question seems to have been answered. The course was reopened as Mirimichi (which is the Native American Cherokee term for 'place of happy retreat') in July 2009, before closing again for further improvements in 2010. The finished course, complete with a 9 hole executive course for children and beginners called Little Mirimichi, was opened in September 2010.

The original fleet of golf carts has been replaced with electric carts, native plants and trees have been planted to reduce the need for maintenance, a new irrigation system maximises the efficiency of water usage and re-circulates water throughout the course and a range of measures have been put in place to protect the site's wildlife.

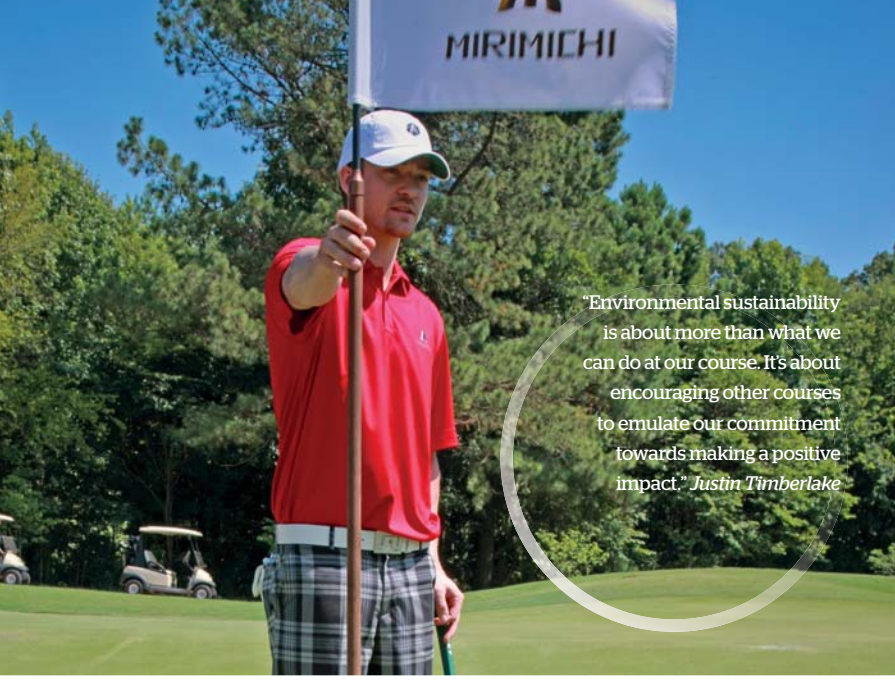
These, along with many other measures introduced to ensure Mirimichi is as sustainably-run as possible, have resulted in the course being the first in the US to receive Classic certification by Audubon International – a not for profit environmental education organisation. It is also one of just 14 golf clubs in the world to be certified by the Golf Environment Organisation, an international non-governmental organisation working to improve the environmental performance of the golf industry.

Timberlake and the team hope it will inspire other golf courses to follow in its footsteps.

"Environmental sustainability at Mirimichi is about more than what we can do at our course," says Timberlake. "It is about taking a leadership role and encouraging other golf



Water consumption is minimised at Mirimichi and care is taken to ensure fertilisers do not drain into streams and lakes



"Environmental sustainability is about more than what we can do at our course. It's about encouraging other courses to emulate our commitment towards making a positive impact." *Justin Timberlake*

courses and organisations of all kinds around the world to emulate our commitment towards making a positive impact on the world that we live in."

HOW THEY DID IT

Early on, sustainability consultants Audubon Environmental were called in to guide Mirimichi through its green improvements. One of the first areas addressed by Audubon Environmental, was the maintenance of 'out of play areas'.

"On your average golf course, more than half of the property is not even used to play golf on," says Audubon Environmental's chief technical officer Russ Bodie.

"A big part of making a course environmentally sustainable is looking at those out of play areas. At Mirimichi, we were able to eliminate more than 100 acres of turf grass on the out of playing areas and replace it with native grasses that require much less maintenance, fertiliser and water. These areas have been planted with wildflowers and thousands of trees and shrubs native to west Tennessee, and are now managed as natural habitats." These areas can be used as habitats for resident animals and as safe corridors for animals to move across the course, Bodie adds.

A new irrigation system helps further reduce water consumption. The Rain Bird 'Smart Pump' software links the pump station to the central irrigation control, which measures on-site rainfall and automatically reduces the amount of water dispensed in line with the amount of rainfall.

The issue of pesticides and chemicals is always a thorny one for operators of golf courses, and it's one that Mirimichi took very seriously when planning the course.

Integrated pest management techniques are used at the course – a sustainable approach to managing pests which focuses on methods that have the least impact on the environment. "Using a chemical is the last resort," says Bodie.

"The most important aspect of managing a golf course so that it has very little environmental impact is a focus on keeping what you need to do to the grass to the playing surface, he continues. "It's important to put out the right amount and type of fertiliser so that it stays on the playing surface and doesn't wash into ponds or nearby streams."

The chemicals and fertilisers used at Mirimichi come from a selected list that has gone through a risk assessment process, Bodie adds, and organic and natural materials are used where possible – walnut extract, for example, is used to control pests in some areas of the course.

Protecting the water bodies on the site was also a big focus for the team at Mirimichi. "We looked at it from the perspective that every pond is a frog's home," says Bodie. "It's not just an area that you drain all the bad water into."

Measures to protect the site's ponds and rivers include draining the course so that the water is infiltrated into the course rather than running into the pond. Native aquatic

GOLF COURSE PHOTOS: ADAM BRADLEY

THE GOLF ENVIRONMENT ORGANIZATION

The Golf Environment Organization (GEO) is an international non-profit organisation dedicated to helping golf to achieve its potential as a social, environmental, and economic asset.

Partnering throughout the industry to establish golf's sustainability agenda and inspire progress, GEO provides guidance and practical tools.

GEO is supported by a global network of partners, patrons, scientists, corporate and individual sponsors and a range of major organisations including The European Tour, European Golf Association, WWF, UNEP, the Club Managers Associations of Europe, America, and China and The R&A.

Jonathan Smith, CEO of the Golf Environment Organization, said of Mirimichi's GEO certification: "What we see here is a model example of sustainability in golf. Mirimichi is well integrated into the community, and has focused on maximising the site's ecological value while minimising resource consumption. Mirimichi highlights that with the engagement of motivated staff who are actively encouraged to explore common sense opportunities to enhance the facility's environmental and social value, golf really can deliver a diverse range of benefits to local people and ecosystems."

Mirimichi is the world's first course to be certified by both the GEO and Audubon International. Timberlake receives the award (above)

vegetation has been planted around the edges of the ponds and streams, which protects the water quality and provides safe access to the water for wildlife.

GETTING EVERYONE INVOLVED

Ensuring that all members of staff were involved and informed about the green features of Mirimichi was critical to its success, says Bodie.

"There is a real top to bottom commitment from everyone on the team to running the course in an environmentally friendly way," he says. "We came in and gave a two hour training session to everyone working at Mirimichi, from the supervisors to the people who serve the food and drink. We ran them though all the environmental measures taken by the course, so that if someone asks them what makes Mirimichi so green they will be able to answer." The staff are kept up to date via environmental meetings and newsletters, and are asked for suggestions of how to further improve the course's environmental performance.

Golfers are educated about the environmental measures via posters, pamphlets and signs, as well as hosted tours and talks. Mirimichi also invites local organisations and charities to take part in events, and learn more about the work carried out on the site.

"Mirimichi reaches out to local gardening clubs, professional golf clubs, local charities and other golf courses," says Bodie. "Local gardeners have been particularly interested in learning about the native plants and flowers, and the organic fertilisers available. It's important to Mirimichi to be able to be a resource for things other than golf."

FUTURE PLANS

A clubhouse is planned for the site, and the management has promised this will be designed and built to high green building standards. Sustainable building materials will be used including local and recycled materials, and the amount of construction waste diverted to landfills will be reduced.

Energy use will continue to be a big focus, says Bodie. "We will continue to audit our energy use and set annual goals for energy reduction. We are looking at solar power and geothermal energy to supplement our other energy use."

The management is also currently looking at golf carts that offer the ability to supplement with solar power.

"Sustainability is a journey," says Bodie. "You can never reach a stage where you can say 'we've arrived'. It's such a growing industry, with new products and improvements constantly evolving to help create an efficiently-managed facility.

"It's about continuing to push boundaries." ●

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JULIANA DELANEY

From the rise of the souvenir shop to Lottery-funded white elephants, Continuum Group CEO Juliana Delaney argues that the attractions industry has learned a lot over the past 30 years

Juliana Delaney helped launch attractions group Heritage in 1985. Heritage changed its name to Continuum in 2001 and Delaney became CEO in 2008

Anyone who thinks they know about the evolution of the visitor attractions industry over the last 30 years would start at the beginning: with a man and a cartoon mouse.

Unless, that is, they had been to Orlando recently; then they would certainly begin with a boy and his owl.

If the genesis of our attractions industry is Walt Disney and Mickey Mouse, its zenith is surely Universal Studio's recently opened Wizarding World of Harry Potter. Here we see how far attraction technology has evolved in a myriad of amazing ways. Yet it is equally fascinating to note which fundamental attraction principles remain constant.

Is it possible, therefore, to look at the development of the attractions industry through the last 30 years by analysing what lessons can be learnt from the new 'boy' on the block and what fundamental principles passed down from Disney, still live on at Harry Potter today?

First though, let's track the maturing attractions industry by looking at its development in 10 year chunks:

THE DISNEY INFLUENCE

In the 1980s, attraction development forever changed the way in which families spent time out of their homes. A rise in the number of Britons taking holidays in the USA in the 1970s meant that early adopters of the attractions industry experienced the Disney magic and sought to wave that same wand over their own fledgling tourist attraction projects. From people-mover systems travelling back in time, to hands-on interactive devices instead of labels, exhibits started to come out of their glass cases. As 3-D tableaux

Universal Studio's The Wizarding World of Harry Potter shows how far attractions technology has come

paired in a variety of different ways with mannequins, critics argued that culture was dead. In this craven new world, the radical concept of leaving through the souvenir shop was born and marketing experts entered the picture as Saatchi and Saatchi created national headlines for the V&A with the campaign: 'An ace café with quite a nice museum attached'.

Museum curators and local authority culture departments gasped in horror – until the visitors and the cash rolled in. By the mid 1980s, families no longer dragged children to museums and heritage centres; parents were dragged to them by their children instead.

The Natural History Museum, Beaulieu's National Motor Museum and the Jorvik Viking Centre in York turned the whole experience of interacting with objects into 'edutainment'; a controversial word that defined the embryonic attractions industry. Suddenly, there was a sliding scale, along which museums could move seamlessly to become heritage centres, and visitor attractions could be part-museum but also part-theme park. We accepted that there was no clear delineation; we were all in the visitor attraction business now.

In charge of the Jorvik Viking Centre during those heady years, I remember defending its popularity and financial success on BBC's *Newsnight*, BBC Radio Four's *Front Row* and on CNN, where I was pitched against some Disney expert who said the mouse was part of America's heritage. By the end of that decade, the success of the visitor attraction concept across its full spectrum was firmly established.

ABOUT JULIANA DELANEY

Delaney has worked for the visitor attractions industry for the past 25 years. She was instrumental in bringing the Jorvik Viking Centre to the international stage and was a founding member of Continuum, joining what was then called Heritage in 1985 when the company was in the process of being launched.

Today, Delaney leads the development of the Continuum portfolio of attractions in her position as CEO. She has been involved in the set-up, launch and marketing of all of Continuum's attractions including Portsmouth Spinnaker Tower, The Oxford Story and The Canterbury Tales. Other key projects have included the £15m White Cliffs Experience at Dover Museum, A Day at the Wells, Vikingar!, Scotland, the £25m Doncaster Dome and the £60m International Centre for Life.

Juliana is also on the board of Visit Kent and is a Merchant Adventurer of the City of York.

THE IMPACT OF LOTTERY MONEY

The 1990s saw a true acceptance of the exciting new approach to the immersive day out experience. Alongside it came a burgeoning suppliers' network ranging from management consultants and concept and 3D designers, to model makers, technology experts and marketing and PR people. This completely new service and manufacturing industry matured over the following 10 years as enthusiastic amateurs became experienced experts. Coincidently the

The Bewilderwood forest adventure park in Norfolk (right) is "winning hearts and awards"

first National Lottery launched in the UK in 1994. By the end of the decade, the Lottery had raised around £7bn for good causes, a large proportion of which fuelled the UK heritage attraction industry. The thin permeable membrane between commercial attractions and museums became even thinner while commercial attraction operators such as Merlin and Heritage Projects could do nothing to stop the tidal wave of public funds flowing into competing attraction developments; despite cries of foul play.

I recall Merlin CEO Nick Varney and I questioning publicly how Tesco or ASDA shareholders would have reacted to a government plan to set up free supermarkets in every city. Yet the commercial attractions sector then comprised of lone voices with no lobbying power. Lottery-funded attractions from the Eden Project to the International Centre for Life got funding and opened, often in direct competition with the commercial attractions on their doorstep.

HIGH PROFILE FAILURES

At the point when money, knowledge and expertise should have come together in the perfect project, the industry created the perfect storm – the Millennium Dome. Indeed, what we learnt from the 1990s was that big budgets alone were not a guarantee of commercial success. Projects had to have a heart.

Post-Dome, more multi-million pound Millennium- and Lottery-funded mistakes ensued; the National Centre for Popular Music, BIG, The Earth Centre. We all knew that list off by heart by the mid noughties. During that period, many consultants, suppliers and advisors sold their souls to the devil by not raising concerns for the future viability of these high cost projects. Who'll confess now to have taken the silver dollar rather than question whether these projects would work? Big budgets allowed extravagant investment in technology; with hands-on interactives, immersive theatres, special effects and devices of all kinds, but there was little thought for long-term running costs or replacement. Such high investment in public-funded attractions drove higher and higher spending in competing theme parks as the next ride had to be bigger and more thrilling to keep the market coming back for more. Yet true gems shone through with relatively low-cost projects such as Bewilderwood winning hearts and awards, while innovative projects such as the London Eye created new market demand and delivered a great return to guests and investors.

"A good story well told is still the most important basis for an attraction. Even at its most innovative and costly, technology is only there to serve the storytelling process"

I returned to Disney's Magic Kingdom recently to revisit Pirates of the Caribbean before visiting Universal's The Wizarding World of Harry Potter and those truisms were evident. A good story well told is still the most important basis for an attraction. The story has to be real and relevant to its location for it to appeal. We know that technology, even at its most innovative and costly, is only there to serve the storytelling process. We have learnt too that visitors truly love interaction with great staff and we have given that interaction a name — guest service – and placed it ahead of making money in our priority list. We are also confident that in through a pre-show, followed by the main show and out through the gift shop is the experience guests love most.

Decades apart, these two attractions reconfirm the fundamental principles of our industry. We are in the enviable business of making memories and when we do it well, those memories last a lifetime and even change lives. What a great industry to be in. Bring on the next 30 years. ●

The growth of franchising has helped companies such as Hilton (above) expand

BOB COTTON

Standards in the UK's hotels and restaurants have risen massively over the past 30 years, says former CEO of the British Hospitality Association Bob Cotton OBE

Thirty years is a long time in the hospitality industry. Three significant changes during this period stand out. Standards have risen hugely, the UK now has many more new hotels (well over 1,000 even since 2003), and it now boasts 140 Michelin-starred restaurants.

In this mix, there have been a series of developments that have shaped, and continue to shape, the industry.

The introduction of technology is making the industry far more efficient than ever before. Yield management systems are maximising income for major hotels and hotel brands, while hand-held wireless systems speed up the ordering and delivery of meals in restaurants. Few hotels would now survive without a website and the ability to book accommodation online.

The growth of franchised brands is changing the face of the sector – almost all new hotels being built today are branded and many are operated by franchisees, not hotel companies. This has enabled the likes of Hilton, InterContinental, Carlson and others to grow and expand without investing much, if any, of their own money.

Curiously enough, the one part of the industry that's expanded hugely is the budget sector, where branding is key but franchising is practically non-existent – certainly with Premier Inn and Travelodge, which are building and operating their own properties in the UK without franchise help.

The 52,000 rooms added in the budget market in the UK in the last eight years represent more than half the total number of new rooms brought on stream in that period. The budget sector is continuing to lead the way with 16,000 new rooms (at least) scheduled to open by 2012.

We still have challenges to face – the skills shortage, for example, though we must take great heart in the number of top-flight young British chefs now running restaurants in the UK. We've never had such a stream of home grown talent in our restaurants before. But major economic events can conspire against us, as they did in the 1980s and 1990s and again in the last two years. The industry has survived the latter through good management and creative marketing – and good luck. The value of the pound against the euro and the dollar helped us more through the recent recession than any action on our part.

Throughout, standards have risen, but that's not to deny there are plenty of independently owned and operated hotels and restaurants that need to refurbish and can't afford to.

The biggest challenge facing the industry now is continued growth. The hotel and the restaurant sectors are keen to expand, and in fact, are doing so. But affordable investment funds are badly needed by many.

Am I optimistic about the future? Yes – very much so. The industry's future is sound. The talent is there, so is the management expertise and the entrepreneurs who see the business opportunities. It just needs fewer regulations and more government support to really maximise its potential.

David Cameron's speech on tourism last summer was welcome. His words now need to be followed by action. Tourism and government have muddled through together for the last 10 years. Surely we can do better in the next decade, so the industry can be recognised for what it is: one of the country's principal economic drivers. ●

ABOUT BOB COTTON Bob Cotton was CEO of the British Hospitality Association from January 2000 to July 2010. Prior to that he spent a year as tourism advisor to the Department for Culture Media and Sport. He is currently chair of the Hospitality Skills Academy. After graduating from the University of Surrey, Cotton joined Gardner Merchant (now Sodexo) in 1974 working for the company until 1998. He was appointed OBE in the 2003 New Year's Honours List for services to the tourism and hospitality industry.

Air passenger duty is deterring UK inbound tourists

PHOTO: ISTOCK.COM/© DAVID JOYNER

KEN ROBINSON

Thirty years ago, there was no internet, no easyJet and Britain had a positive tourism balance of payments. Tourism Alliance chair Ken Robinson CBE looks at the dramatic changes seen by the industry

The last 30 years have seen radical, unforeseen and unprecedented growth and change in tourism. International tourism arrivals have increased by more than 300 per cent from around 280 million in 1980 to around 900 million this year. Why? Because tourism is aspirational. When people can travel (because the transport links are available, they can afford it, are allowed to, and it is safe to do so), they will. Tourism growth is powered by rising disposable income, the removal of political and trade barriers and greater awareness and expectations among travellers.

Back in 1980 Britain was in recession. GDP had fallen 2 per cent that year and unemployment was rising. The government responded by cutting spending and increasing taxes. A determined Prime Minister, then Margaret Thatcher, was "not for turning". History repeats itself!

Tourism was very different in 1980: there were US$2.33 to £1 and Britain made net gains from international tourism. Overseas package holidays were booked through travel agents and from media advertisements at fixed prices. Available capacity sold out months in advance; after Christmas the coming season's holidays went on sale and bookings flooded in.

THE INTERNET REVOLUTION

In the last 15 years the internet has completely reshaped consumer travel choices. In 1990 there were two million internet users worldwide; now there are two billion. The diversity of opportunities has exploded since booking engine software and online commerce became reliable. Dynamic pricing followed, with 'yield management' software spreading demand, reducing seasonality and maximising revenue for hotels, airlines and other tourism products. Trips are more frequent and much shorter. Bookings are made much closer to travel dates, except where limited by capacity. These changes are very recent. Lastminute.com, Expedia, product comparison sites and internet travel companies have all emerged in the last decade.

Low cost airlines have accelerated the revolution. In 1985 Ryanair had just one route from Waterford to Gatwick; now it has 1,100. After the liberalisation of European flights in 1997, low cost carriers opened up regional airports and made direct holiday flights affordable and convenient. Cross channel tourism was boosted by the opening of the Channel Tunnel in 1994, and rising competition caused the uncompetitive ferries to cut fares.

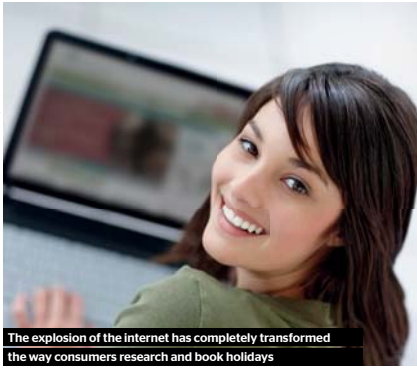
NOT JUST ABOUT FAMILY LEISURE

In 1980 most leisure activities and holidays were taken by families. Until the Sunday Trading restrictions were lifted in the mid-1990s, Sunday was the main day for a family day out. Now young people expect to enjoy leisure separately with their contemporaries. The older generations have become a key market for frequent holiday breaks. A 2010 household may have two or even three cars, with individual leisure activities being followed. Road congestion and the cost of travel are now limiting day visit activity.

Even before the Lottery pumped millions into Britain's museums and heritage attractions, the sector was booming; two out of three visitor attractions having first opened since 1980. The number of attractions

Domestic tourism has seen a boost, but the balance of payments deficit in tourism is a real problem for the UK

PHOTO: ISTOCK.COM/© JACOB WACKERHAUSEN



The explosion of the internet has completely transformed the way consumers research and book holidays

KEN ROBINSON Ken Robinson is an independent tourism advisor. He was appointed chair of the Tourism Alliance in September 2009. He has worked within the industry since 1969 and has been a board member of national and regional tourist boards as well as CEO of Leisure, Recreation and Tourism Ltd and its subsidiary Ventures Consultancy Ltd. A former chair of the Tourism Society and chairman of the Visitor Attractions Forum, he was awarded a CBE for services to tourism in 1997.

grew faster than their visitor numbers. Admission charges outstripped inflation at private sector attractions that now find it hard to compete with their grant-aided, charitable, Lottery-supported competitors and with free national museums.

The seemingly inexorable growth in tourism demand has tempted governments to tax tourism, often citing climate change. Air passenger duty is deterring inbound visitors but keeping the Brits at home and boosting domestic tourism. Destinations in the developing world are losing vital income. The richest tourists aren't diverted by 'rationing by price', but wealth alone must not determine who can travel; since global and European migration, many need to do so for domestic and social reasons. Popular destinations have already reached capacity at peak times, yet the mass population countries (including China and India) have hardly begun to travel.

For 30 years the industry's focus has been on promotion. In future it will increasingly be on selectively managing tourism flows, distinguishing between 'good' tourism, which benefits destinations, and 'bad' tourism, which is unsustainable or harms host communities. A growing hazard for international travel is disruption by shocks and deterrents of all kinds: including volcanic ash, bird flu, terrorism and war. In response, borders are tightened, restrictions implemented and tourists stay away.

THE ROLE OF GOVERNMENT

For 30 years, British governments have failed to appreciate the potential of tourism and have repeatedly cut budgets as global competition has intensified. A positive tourism balance of payments in 1980 had become a £20bn deficit by 2008/9. In 1980 the British Tourist Authority was running most overseas marketing and, as ever, winning prizes among its peers from competitor countries.

Over recent years Britain's overseas marketing has fragmented and weakened. Labour's devolution has, since 2000, diverted more money into tourism, but destroyed cohesion. To boost regionalism, Labour created the Regional Development Agencies (RDAs) and abolished England's national board. Scotland and Wales chose to increase separate tourism marketing, as did Mayor Ken Livingstone in London. The Regional Tourist Boards in England had since the 1970s been successful public-private partnerships between businesses and local authorities, but they were killed off by the RDAs who appointed new delivery partners. This hasn't 'mainstreamed' tourism into economic activity, as anticipated, so with the imminent axing of the RDAs, many grant-sustained destination bodies are threatened, expertise is being lost and tentative networks are being destroyed. Nobody knows whether the new Local Enterprise Partnerships will prioritise tourism, or act collectively with destinations and VisitEngland, as is essential for the industry to thrive.

My personal high point of the past 30 years has been working in such a dynamic sector. My greatest disappointment is not yet having persuaded senior politicians of the role they and public funding must play to realise tourism's economic, social and cultural benefits. But we owe it to future generations, never to give up. ●

Globalisation and a rise in disposable income have had a huge impact on the spa industry over the past 30 years, says ESPA founder and CEO Susan Harmsworth, MBE

Susan Harmsworth founded ESPA in 1993

Susan Harmsworth

How has the global spa market changed over the past 30 years?

Thirty years ago, spas didn't exist. Instead there were clinics, health farms and thalassotherapy centres; these were the domain of the extremely wealthy or were subsidised by governments for heath-related recuperation. Every country had its own philosophy, often based around health, and very much rooted in the history of the country, such as Thai massage, ayurveda and Chinese medicine.

In the 1980s, the word spa really started to evolve and the focus moved away from health towards stress-related treatments focusing on indulgence and relaxation. This gave way to the birth of the hotel spa, where hotels began to have spas dedicated to relaxation and escapism.

What have been the highlights for you personally?

I have been in the industry for 40 years. Launching ESPA as a brand in 1993 was a huge milestone and one of my lifetime's achievements. We have built the best team in the industry, employing more than 200 spa professionals. I work with my two sons on a daily basis and I now have two wonderful daughter-in laws and five beautiful grandchildren.

As a company we have won and retained many prestigious awards, have opened satellite offices in Hong Kong, Dubai and the USA, and we now distribute to over 50 countries.

Last year I was awarded an MBE, which was a wonderful achievement.

What have been the biggest events that have shaped the industry over the past 30 years?

The world has become a very small place. There's been a huge increase in travel, and as a result the boundaries and cultural differences have lessened, encouraging a complete globalisation of the spa industry.

Almost no-one escapes stress in today's society. People need a way to escape and relax; a physical and mental distraction from the stresses of modern day living. The increase in women working and having financial independence has resonated within the industry; there has been a huge surge in the social side of spa as a result. Men and women also have more disposable income today – health farms were once an unobtainable luxury, whereas spas are now seen as an affordable luxury.

These factors have opened the spa world to a much bigger market, and there has been a huge increase in guests of all ages and sexes.

What have been the main challenges faced by the industry?

There have never been what we would call industry norms – there has been a lack of consistency in training standards and many countries still don't have them, which means that while spa is a global entity, there are no universal benchmarks. The spa offering is erratic and varies considerably between countries. Similarly, every

ESPA works with a range of architects and designers to create high end spa environments across the world (above)

ESPA

ESPA was launched in 1993 by Susan Harmsworth. The company offers spa design and management services and develops high end skincare products and treatments. ESPA has designed and created lifestyle spas for five star hotels including The Peninsula, Mandarin Oriental, Sol Kerzner's One&Only, The Leela Palaces Hotels & Resorts, Ritz Carlton, Gleneagles in Scotland and the Metropole Monte Carlo. The company has developed more than 30 ESPA spas and operates in 55 counties. It offers 85 skincare products across six ranges.

The company puts a strong focus on education and training, and runs two training schools in the UK. ESPA has a team of 19 international trainers, who carry out training both at the schools and on site within clients' spas.

In June 2010, Susan Harmsworth was awarded an MBE for services to the spa and beauty industry as part of the 2010 Queen's Birthday Honours.

country has a different understanding of what spa is, and this can create confusion for the consumer.

Training is key. It has become apparent that not enough emphasis is being placed on staff training, particularly in anatomy and physiology and all the contraindications. There are a lot of people going into the industry without sufficient knowledge and experience.

What have been the biggest breakthroughs?

The perception of the spa industry has changed dramatically. Today there is a general recognition that the spa industry is a valuable and worthwhile one, with many complementary and alternative therapies being accepted and regarded as mainstream. When I started in the industry, many of these practices were viewed with suspicion, but today anything that helps combat stress and promotes escapism and relaxation is celebrated.

Globalisation is a great thing; there has been a move towards the development of organisations to set and monitor standards globally. Hoteliers are recognising that spas in hotels are a means of attracting people and driving business and that they help to extend guests' vacation times and increase the average daily spend and double occupancy.

What do you see as the main challenges for the industry today?

I think it's difficult to deliver consistency – there are many people who don't take education and training seriously enough. It will be difficult to find the next generation of spa leaders without an adequate emphasis on training, education and standards.

It's hard for the consumer to understand the spa concept fully, especially as people are overusing the term 'spa'. There's been huge confusion in the marketplace about products; consumers are perplexed by which products really are natural, and which simply contain organic ingredients, as many people continue to make claims that can't be substantiated. Spas have never been seen as a necessity, and so the industry has suffered as a result of the global economic climate. As a business, spas are also hard to make financially viable.

What trends will emerge over the coming years?

I am hugely optimistic about the future for the spa industry, but I believe the sector will evolve and morph into something else. I think there will be a greater emphasis placed on health, complementary medicine and well-being and these will become as one within the spa world. This won't come without challenges, as it will be even harder to define, but in time things will progress and eventually settle.

Relaxing treatments will remain integral but there will be an emergence of quicker, effective treatments.

The social side to spa will also evolve, with people combining socialising and relaxing, as time becomes more and more precious. ●

BRIGID SIMMONDS

A range of legislative acts have transformed the leisure and sports sector, but it's the social changes that have had the biggest impact, says CCPR chair and British Beer & Pub Association CEO Brigid Simmonds OBE

I can't quite remember the birth of *Leisure Management* in 1980, however I joined the leisure industry six years later and I can well remember the discussions with editor Liz Terry during my time with architects Sargent & Potiriadis and every year since!

In 1986, sport and leisure design had moved on from the original Crowtree Leisure Centre in Sunderland – a multi-leisure centre for a new generation – to The Coral Reef in Bracknell and eventually to the Guildford Spectrum, a leisure centre of extraordinary breadth, incorporating an ice rink and ten-pin bowling as well as competitive and leisure water.

Much has changed in our attitudes to leisure out of home over the last 30 years. In those early days we ate out less, television offered far less choice and we were nothing like as discerning about the quality of the leisure experience outside the home as we are today.

At the end of the 1980s, the Local Government and Housing Act came into force amid concerns of high borrowing levels by local authorities; this saw the end of a boom in local authority spending on leisure. Next came a trend for active leisure facilities in shopping centres, but with the exception of Scotland, where ice rinks can work with retail, most retail developers recognised that people did not go shopping and swimming at the same time.

LOTTERY TRANSFORMS SPORT

1994 saw the introduction of National Lottery funding and a transformation for sport. I was a member of the first Sport England Lottery Panel; we were distributing some £250m a year, and sport got 25 per cent of the proceeds. It is with some satisfaction I note that, 30 years on, that original balance will be restored by the present government in 2011.

Back in those early years many major sport and leisure developments were funded by Lottery money. Many of these projects had been on the back burner for several years and a whole plethora of clubhouses and changing rooms, as well as the Outdoor Basketball Initiative and the Awards For All grants scheme owe their development to Lottery money. There were also some major new national and regional Lottery-funded venues, including Wembley Stadium, the English Institute of Sport in Sheffield; the Millennium Stadium in Cardiff and Caversham Lakes, just north of the Thames. The Lottery really did put sport on the front foot.

Sport has changed beyond all recognition in the last 30 years and for those of us who really care, the final dénouement must be London hosting the Olympic Games in 2012. This represents the achievement of a lifetime and has pushed sport up the agenda for government in a way which no other sporting event ever could, or ever will, again.

PHOTO: WWW.LONDON2012.COM

London hosting the 2012 Olympics represents the "achieverment of a lifetime"

THE LICENSING ACT AND SMOKING BAN

The wider commercial leisure sector has also changed hugely over the past three decades, with the Licensing Act and the smoking ban both having a huge impact on businesses in the sector.

The introduction of the Licensing Act 2003, which replaced the Licensing Act 1964, was a major change. Gone was the delineation between pubs, bars and nightclubs – before the 2003 Act, nightclubs were the only late night entertainment venue which could open after 11pm. Mind you, the average pub today is open just 23 minutes later than it was before the Licensing Act 2003 was implemented.

The smoking ban also had a huge impact on leisure venues. Some 29 per cent of the population smoked, but in pubs the number could be as high as 60 per cent. While many non smokers wel-

PHOTO: ©BRIAN NORVIEW, JAMES MCCORMICK

comed the change, there's no doubt that it devastated indoor leisure. Pubs, restaurants, hotels and bingo in particular, have all felt the pinch. The ban has led to a growth in the food offer in many pubs, however, and pubs now serve more food than restaurants in the UK.

CASINO DEREGULATION

The Gambling Act 2005 has created considerable changes within the gambling industry. However, because of the complete legislative chaos of the casino deregulation, it hasn't resulted in a major increase in venues. The real change has perhaps come in the use of technology within the industry. The growth of online gambling and gaming is a reflection of our technological age, but one could argue that the move away from social interaction created by going out to bingo, casinos and the bookies is not really in the interest of our national psyche. Betfair and the growth in betting on anything and everything has perhaps led to the lack of integrity which we are now seeing in some sports. Cheating is something none of us should support.

AN INCREASE IN QUALITY

The continuing quest for quality is perhaps at the heart of evolution in leisure. We have seen huge improvements in quality right across the industry. Hotels, restaurants, health clubs, pubs and even motorway service stations have been transformed over the last 30 years. The huge growth in affordable, clean budget hotels has seen the demise of the two or three star hotel in many places.

ABOUT BRIGID SIMMONDS

Brigid Simmonds was appointed head of marketing for architect Sargent & Potiriadis in 1986. In 1992 she joined Business in Sport and Leisure as CEO, where she stayed for 17 years. She was appointed CEO of the British Beer & Pub Association in 2009, and has been chair of the Central Council for Physical Recreation since 2005. Simmonds received an OBE in 2006 for services to sport.

So what in terms of other legislation has transformed the leisure industry over the last 30 years? The introduction of the 48 hour week and other EU legislation has certainly created change. The National Minimum Wage has raised standards, but its rise every year, particularly in the early years post-1997, has led to a changing structure in management for many companies in the leisure field. Large annual rises have created flatter management structures.

Social change and concerns about our health are changing our lifestyles. The obesity crisis has put into sharp reflection the need to lead a more healthy lifestyle. Government departments are keen to move away from a 'department of sickness', to a 'department of public health' which really does support physical activity.

Change, change, change; not to my mind for the sake of it, but as part of evolution. There's no doubt that sport and leisure is alive and well after 30 years. I have little doubt that these sectors will lead us out of recession over the next few years. A new generation takes over and Twitter, Facebook and social interaction online and by mobile phone dominates our choices of how to spend our leisure time. It is exciting, engaging and healthy! ●

SPACE TO GROW

As The Third Space prepares to open its second club in Marylebone in the spring, CEO Eric Dunmore speaks to Kate Cracknell about his rollout plans

Dunmore became CEO in 2007

"I left university with a history degree," says Eric Dunmore, CEO of The Third Space. "What was I going to do with that? I decided to train in something more vocational and qualified as an accountant. It sounded desperately dull, but my careers advisor suggested it would at least open doors, not close them."

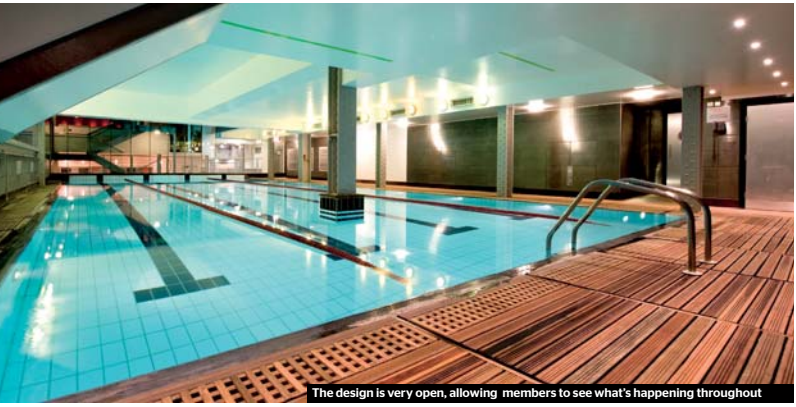
Having worked his way up to managing partner in an accountancy firm by his early 30s, Dunmore then left to pursue other interests, joining leisure business Longshot. The owner of a number of restaurants, Longshot also acquired the famous Groucho Club in June 2001 and, at the same time, opened The Third Space, a 3,716sq m (40,000sq ft) independent health club in Piccadilly Circus, central London.

"Longshot carried on trading successfully until 2006 when, in order to provide a return to our shareholders, we embarked on a series of disposals, selling the Groucho Club and the restaurants. But we held on to The Third Space and I woke up one day in December 2006 thinking: 'It's simply the best business I've ever been involved in. It's fun, it's exciting, it's energetic.' So I put together a plan for a management buyout, backed by the private equity company Graphite Capital, and on 1 August 2007 we completed the deal."

A NICHE OFFERING

Dunmore readily admits to having "no fitness expertise at all, only business expertise", but he surrounded himself with experts from the fitness and medical sectors to develop a strong concept for The Third Space.

"We saw the fitness industry as being quite like the pub sector in the '80s, with big chains operating what we felt were tired concepts. They


The design is very open, allowing members to see what's happening throughout

The varied exercise classes are an integral part of The Third Space offer

weren't focusing on being fun, interesting or value for money. There were a lot of facilities, but not many clubs. Many were chains with what I would call 'names' rather than real brands.

"We felt there was a real opening for a niche player and decided to introduce a high quality product, with high quality employees, pricing it to achieve a return but also offering value for money.

"We wanted to make it full of fun, energy, enthusiasm, excitement, colour, vibrancy, variety. To have different classes at different times every single day and in every single space throughout the club. To constantly push the boundaries and build a club atmosphere rather than just being a facility.

"The concept of The Third Space is first space home, second space work, third space 'your space' – doing what you want to do, how you want to do it, when you want to do it, with whom you want to do it. Everyone's an individual and the key is to treat them as such."

He continues: "We charge £1,240 a year and don't discount, and roughly 60 per cent of our customers choose to pay annually in advance. That means we have a very solid business, allowing us to invest in our product and our employees."

INVESTING IN PEOPLE

People are clearly a key focus for Dunmore. "We work as hard as possible to get and retain the best employees. People want to work for us because we pay well and we look after them. We have training programmes for everybody – if the fitness team hits its targets, everyone gets £150 a month to do whatever training they want – and we do what we say we're going to do. It's as simple as that. If you behave like that with people, you get more out of them.

"As a result of our employees, we have what I believe are the best retention rates in the industry. Our year ended on 30 September 2010 and we retained 85 per cent of our annual members. If you include everyone on monthly direct debits, our retention is just over 70 per cent. That's ignoring all new sales – simply looking at the people we had at the beginning of the year and seeing how many of them we still have as members."

It's clearly a strong business model that's bolstered further by revenue streams such as pilates and personal training. "Our pilates studio – which is also open to non-members – offers one-to-one classes and we've found it to be a big driver of growth," says Dunmore. "A couple of years ago we took about £68,000 on pilates and last year we took in excess of £256,000.

"Personal training accounts for about 25 per cent of our turnover. That's grown hugely in the last few years and I think we can take it much further.

"I think the growth opportunity is in showcasing what personal training can achieve for people. However, ours is a retail business – you can't force people to buy something by making it the only option, so everyone has programme design included in their membership, plus all our PTs are on the floor to answer questions. We only employ PTs, who also act as gym floor instructors, and they all have a sport science degree or equivalent, and at least three years' experience."

MEDICAL OFFERING

The club also has a medical centre as part of its offering, covering a wide range of services including acupuncture, reiki, shiatsu, podiatry, chiropody, physiotherapy, osteopathy, colonics, nutrition, counselling and massage.

"Running a medical centre is the most difficult thing we do," says Dunmore. "It has to be a separate legal entity

as it's regulated by the Care Quality Commission. We employ our own full-time GP and he's the gatekeeper for the whole practice. He carries out internal audits of the medical outcomes of patients to ensure that, clinically, we're producing good results. He's then audited externally by another GP, and we have a panel of self-employed senior practitioners who vet any new practitioner we put forward. The integrity of the centre is very strong.

"We market it as a separate entity – approximately 40 per cent of custom comes from the club and around 60 per cent from outside, mostly through word of mouth. And it's very successful. It turned over about £1.6m last year.

"That means there's enough business coming through the doors that practitioners are happy to cross-refer to each other, plus we have referrals both ways between personal trainers and the medical centre. And that's quite a big step for our industry, because people normally tend to claim they can do everything. But being willing to pass a client on to someone who's a real expert in their field is in the best interests of the customer and is a philosophy we certainly encourage.

"We're also signing an agreement with the Royal British Legion, our nominated charity, to provide rehab services for injured servicemen, as well as fundraising for them and even providing work placements at the club for those leaving the forces.

"The concept of integrating health and fitness is in the name of most clubs, but it's actually a reality with us."

> "There's plenty of opportunity in London and that will be my focus. However if we can make the concept work across the capital, we may consider rolling out elsewhere through partnership deals"

NEW VENTURES

Dunmore now plans to roll out more Third Space clubs across London.

"I'd like to be in Chelsea and maybe somewhere in the City, although that's a hard environment," he says. "Clapham would be great, and perhaps London Bridge. Even Richmond or Greenwich in due course. When we launched the management buyout, the backing was for a 'five clubs in five years' plan. The recession affected everybody, ourselves included, so in my mind that five-year plan starts now.

"There's plenty of opportunity in London and that will be my focus – I don't know cities like Manchester or Birmingham well enough to expand there. However, if we can make the concept work across a number of locations in the capital, it may be that we consider rolling out elsewhere through partnership deals in the longer term."

For now, the second Third Space site is under construction in the Marylebone area of London. Due to open in spring 2011, it's a 1,350sq m (14,500sq ft) location in the Marylebone Hotel.

"The owners had recently spent £37m refitting the hotel and wanted to upgrade the gym, which was run by Virgin Active – a former Holmes Place club," says Dunmore. "We were approached by the owners and, based on our designs, they awarded us a 15-year lease.

"We're retaining the pool but everything else is being gutted. Marylebone has more of a village feel to it than Soho, so the finish at the new club might be softer, but design-wise it will have some similar features to the Soho club: open plan, with no corridors and an open stairwell so you can see everything that's going on around the club – I think that encourages people to try new things.

"We're also putting in a Retro Gym. I don't want to give too much away at this stage, but it fits in with fitness' current trend towards using body weight as much as possible and is designed to be a bit of fun. It'll be almost like an old-style school gym, where the circuit training approach included some pretty effective exercises.

"We aren't having a medical centre in Marylebone but, to add to our product range, we're going to put in a spa, which we're calling The Third Spa: three treatment rooms, two of which will be wet rooms, plus a separate manicure area and possibly also a spray tan area. We'll also offer our own Third Spa signature treatments, which we're currently working on. This spa offering was key to the hotel.

"Ultimately we're there because the hotel has invited us, and it's fundamental to the relationship that we treat their guests absolutely as our own members. But we'll also be selling memberships and our Soho members will be able to use the new club too.

"I know spa is quite a crowded sector, but I've been to a lot of spas in the last nine months and the customer

The 20m swimming pool is ozone-treated

The Soho club contains a 75sq m climbing wall, designed for both novice and intermediate climbers

experience really could be better. I think all too often the focus is on how soft the towel is rather than on how good the treatment is.

"I realise going into spa is quite ambitious but – and I may have to eat my words – I believe it will be less hard than running a medical centre."

SECTOR ANALYSIS

And yet, in spite of The Third Space's success in running a medical offering, Dunmore dismisses the fitness industry's potential to link in more closely with the healthcare sector.

"It's never going to happen," he says. "People are living in a dream world. Getting practitioners to get to the point where they're confident enough to refer to another practitioner requires them to know each other quite well. They just won't do it.

"In any case, I don't think there's anything wrong with just saying we're the health and fitness sector. What's wrong with being really good at helping people get fitter? It's already a great industry and it has to be the way of the future, because more people are seeing the benefits of exercise across all ages. Why do we have to start using long words to describe what we offer?"

Saying all that, does Dunmore even see The Third Space as part of the health and fitness industry? "Well, of course we're part of that sector – the leisure industry – but do I think we're part of the health and fitness industry as provided by clubs across the UK? No. Other operators would look at us and tell us we run a very bad business: far too many employees, towels twice as large as they need to be and so on. They'd probably take all that out with a view to making more cash. I believe churn would go up as a result.

"Now they might be right, but all I would say is that I have a solid business that's grown even in the tough conditions of the last financial year. We were recently voted 'London's Best Health & Fitness Facility 2010' at the London Lifestyle Awards and we have very, very high levels of retention, even in the transient marketplace of Soho. If we can now replicate that in two or three other places, then I think it proves the strength of our brand and our business model.

"Most clubs are run as cash cows. Repairs and maintenance expenditure is minimal and there's a low-level approach to customer service. But we're a retail business, and as they say 'retail is detail'. If you focus on the minutiae and get those right every single day, and if you invest, you'll have a fantastic product. But the industry doesn't always do that.

"One of the other things that surprises me about the industry is that it's unbelievably arrogant about members. The prevalent attitude seems to be that, once someone signs up, that's it – they're in and you can move onto the next kill. But you just can't build a business on that.

"The professionalisation of the industry is also aeons away, with no really good training programmes. The handling of employees and the rates of appreciation or pay that they receive are also astonishingly low given the skills of some of those in the industry – the personal trainers out there with sports science degrees and a wealth of knowledge, for example.

"On the plus side, I think the industry as a whole is getting better at communicating the value of regular exercise, and it's trying to become a customer service industry," concludes Dunmore. "But that's still a long way away." ●

ROB GREGORY

From leg warmers and the introduction of monthly payment plans to mobile phone applications, Rob Gregory looks back at 30 years in the UK health and fitness industry

The metamorphosis of the gym in the last 30 years has been dramatic. This change began with product innovation and a handful of individuals well ahead of their time. The UK was led by the US – Jane Fonda launched her workout DVD, Arthur Jones created Nautilus and Bally acquired the Lifecycle. These products, and others, changed the image of the traditional gym.

Over the next 25 years, the evolution of fitness equipment continued to have a major impact on health clubs. Some of the winners were the Stairmaster, the Elliptical, the Spin Bike and the TG Key System. On demand entertainment also transformed the user experience.

THE EARLY VISIONARIES

At the beginning of the 1980s, Harm Tegelaars, David Lloyd, Lawrence Alkin and Allan Fisher, and a decade or so later Mike Balfour, began to make their mark on the UK health and fitness industry. It's a testament to their achievements that their original visions and business empires still exist today. The US had its own visionaries, most notably Mark Mastrov, who built his first club in 1983 and went on to build the largest wholly owned group of clubs in the world.

One of the critical events during this early phase of growth was the pioneering use of electronic funds transfer. This, coupled with the adoption of month to month payment plans, opened up gym membership to the masses. Demand outstripped supply and during the 1980s and most of the 1990s the industry experienced double digit growth and exceptional returns on capital. This in turn stimulated a number of new entrants and Esporta, LA Fitness and Duncan Bannatyne entered the market. Fitness First and Holmes Place also entered Europe in the late 1990s.

A STEP TOO FAR

This hive of activity, several high value transactions and a business with predictable cash flows caught the attention of the City. Following in the footsteps of Holmes Place in 1997, Fitness First, LA Fitness and Cannons all listed on the London Stock Exchange in 1999. At the same time Virgin Active was launched. The industry had come of age.

In the year 2000, JJB Sports became the last major new entrant and clubs openings peaked in 2001 with 172 new clubs opening that year. A few years later, several major operators delisted, and a recession coupled with over-aggressive expansion and poor site selection meant the health and fitness industry had its first setback. It reflected a move into maturity with greater competition and a slowdown in growth. Private equity funds picked up the pieces and the industry entered a new phase.

MARKET MATURITY AND FRAGMENTATION

Slowly and quietly, local authorities, management contractors and leisure trusts have increased their investment in health and fitness in the last decade. In many cases this has resulted in local authority centres on a par with private clubs.

More recently the arrival of the budget operator has caused added concern for existing operators. While this

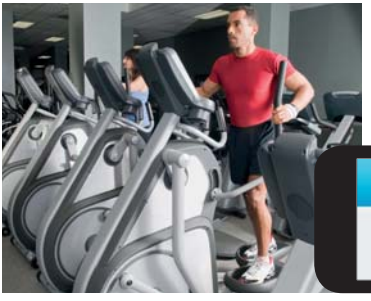


PHOTO: ISTOCKPHOTO.COM/© ELIZA SNOW

Technology is having a huge impact on the industry, with products like Suunto (right) and dailymile (below) helping people track their fitness levels

The quality of health and fitness facilities has improved hugely across both the public and private sectors

PHOTO: DAVID LLOYD LEISURE

fragmentation of the market should have been expected, not many were ready. This nascent sector of the market is expected to reach eight per cent of the total number of clubs within the next five years. Some leisure trusts have already entered this market with price points comparable to their private sector counterparts. There is also increasing interest in smaller format clubs like Anytime Fitness.

Despite competition and the effects of the recession, the health and fitness market has proved remarkably resilient. Although at best operators will be producing flat like for like performance, this is far better than many other sectors. While other operators may be able to sit tight, for private equity owners this is a problem. Consolidation is clearly on the cards.

ABOUT ROB GREGORY:

Rob Gregory started working in the health and fitness industry in the early 1980s as a gym instructor. He moved onto club management, before launching corporate fitness management company The Fitness Company in 1986. After selling the company in 1990, he completed an MBA and then ran Forza Fitness Equipment's UK commercial business for six years before helping to launch European health and fitness operator Elixia in 2000.

In 2004 Gregory started working as a consultant. He then joined Fitness First in 2007 as global member experience director and a member of the executive board. In 2009, he relaunched his own business, Lifetime Health, with a focus on developing digital strategies for the health and fitness sector.

EVERYTHING IS ABOUT TO CHANGE

As an industry we need to acknowledge and recognise how far we've come. But we have no time to be complacent. Old models die hard and we have to change to survive.

At a fundamental level we all have to be clear what our value proposition is, and we must ensure that we deliver.

The industry has approached social media with trepidation but we can't sit on the fence any longer. We have to listen and engage with our customers in order to develop.

Much of the change we are experiencing is driven by technology and we are now competing against an array of digital products. I now engage with 'dailymile' and track my fitness progress through my Suunto watch; it also tells me if I'm over-training or not doing enough. And at last count there were over 7,000 mobile health applications of which over half were health and fitness related.

In short we have to get better at helping people stick with the habit of exercise and keeping them active, wherever and in whatever way makes sense to them. One thing is also abundantly clear. The health problem in this country and elsewhere requires government intervention and our industry needs to be at the table for this debate.

The need for the services we offer has never been greater as the health of the nation continues to deteriorate. But we are perfectly poised to take advantage of this opportunity if we are willing to learn and adapt. ●

Forest Retreat

As five star New Forest hotel Lime Wood opens its new destination spa, Magali Robathan speaks to its chairman Robin Hutson about his plans

What hits you first about the five star Lime Wood country house hotel is not the restored Georgian exterior, impressive though it is, nor the tweed-clad staff, nor the brand new spa with its herb-planted roof. The first thing you notice is the surrounding countryside – the drive up to the hotel takes you through stunning New Forest scenery dotted with wild ponies that amble onto the road with no regard for the traffic.

This is exactly the way the management of Lime Wood want it. The intention was always to let the forest take centre stage. "We like the Britishness of Lime Wood and the fact that we are in the middle of the New Forest," says Lime Wood Group chairman Robin Hutson. "We are very interested in the provenance of our food and we wanted to incorporate all of these things into the hotel and spa."

With this in mind, guests are encouraged to borrow wellies and bikes and explore the surrounding area, while spa guests can practice yoga on the building's living roof or lounge in the sauna and hydrotherapy pool taking in the forest views. The hotel uses as much New Forest produce as possible, and employs a dedicated forager to search for wild food in the surrounding woodlands.

As well as 29 bedrooms – 16 of which are in the main house, and 13 in three garden lodges – Lime Wood features two restaurants: The Dining Room, which offers a formal dining experience, and the more informal Scullery brasserie.

The hotel opened in November 2009, following a renovation project that took five years and cost £30m. Its spa, Herb House, opened in November 2010, and is, according to Hutson: "The final piece of the puzzle".

THE BACKGROUND

The Lime Wood story began back in 1999, when businessman Jim Ratcliffe – owner and chairman of the Ineos chemicals group, the UK's largest privately-owned company

Herb House's pool has retractable windows that offer views of the surrounding forest (main pic, opposite page); Guests can borrow wellies to explore the area (above right)

– teamed up with Hampshire chef Alex Aitken and bought what was then the Parkhill hotel. In 2004 Ratcliffe and Aitken closed Parkhill, with the intention of transforming it into one of the best country house hotels in the UK.

The refurbishment project saw the original Regency building almost entirely rebuilt. The renovation was carried out by architect Charles Morris – whose previous commissions include the Orchard Room at Highgrove for the Prince of Wales – and designer David Collins, responsible for the interiors at London's Claridges Bar, The Wolseley and Nobu Berkeley Street, among many others.

In 2008, Ratcliffe approached Hotel du Vin founder Robin Hutson to help oversee the project. Hutson had sold Hotel du Vin in 2004, before joining the Soho House Group as chairman. The Soho House Group was sold in 2008, and while Hutson continued to work for the company as a consultant, he found himself with free time on his hands.

"When Jim Ratcliffe asked me to come down and look at the hotel to see if I wanted to get involved, I was blown away by the quality of the build," says Hutson. "I know this area pretty well and my work for Soho House was coming to a natural end, so I thought, why not?"

Hutson is chairman of the Lime Wood Group, which owns Lime Wood; Whitley Ridge hotel, an 18th century country house hotel in the New Forest; and four luxury chalets and a hotel in Courchevel, France. His original role at Lime Wood, he says, was to "develop the spirit of the hotel, and concentrate on the marketing and style."

When Hutson joined the Lime Wood Group at the start of 2009, the positioning of Lime Wood still hadn't been decided. As a result of his previous involvement with two very different country house hotels – the formal Chewton Glen in Hampshire and the informal, highly fashionable Babington House in Somerset, part of the Soho House Group – Hutson was convinced that the gap in the market lay somewhere in between. "We want the staff at Lime Wood to be friendly, but we don't want them to be stiff and starchy and we certainly don't want to be subservient and formal in the old style of country house hotels," he says. "We want this to be a fun and relaxed place; somewhere you can put your feet up and not be constrained by daft rules."

While Hutson feels that they've largely achieved this aim, his legendary attention to detail means he's never entirely satisfied. He says that some of the furnishings are a little "precious" and is planning to rip up the carpet in the formal dining room because "carpet in a country house hotel suggests a hushed environment, and that's not what I want."

Of course the most important aspect of creating the right ambience is the staff, and Hutson admits this has been a challenge. "If you tell staff you are looking for informality and friendliness, that can easily be interpreted the wrong way," he says. "What people have to understand is that a lot of the young kids we employ haven't necessarily had the experience of five star hotels and nice restaurants. Getting

them to really understand guests' needs is taking them out of their comfort zone. You're asking a lot of young people who might have only been out of college a couple of years."

Training is crucial, says Hutson, but even more crucial is employing the right people in the first place. "I used to believe you can train anyone to do anything," he says. "I no longer believe that. I now believe that nice people give nice service. You try to employ nice people who instinctively enjoy delivering pleasure to people. They must intrinsically want to be with the public day in day out and genuinely get pleasure from seeing them enjoying themselves."

HERB HOUSE

When Hutson joined Lime Wood the majority of the work on the hotel had been completed, and the shell of the spa had been built. The spa project was put on hold to allow the team to concentrate on finishing the hotel and also to give them time to think about what they wanted to create.

"The spa market is a competitive one and I didn't want ours to just be another hotel spa," says Hutson. "I really wanted to create something destination-worthy."

After considering various different concepts, Hutson and his team decided that the spa should take its inspiration from its location. "We thought it was important to create something British that was as natural and organic as possible in both the design and the treatment offer," he says. "We decided to create a herb-covered roof garden on top of the spa, and Herb House was born."

The spa is spread over three levels and has 10 treatment rooms, a 16m ozone-treated indoor pool with retracting doors to the garden, a hydrotherapy pool, a rooftop gym, a mud house, caldarium, steam room and sauna and a room for manicures and pedicures. The pools are by Barr and Wray, the sauna is by Klafs and the equipment in the gym has been supplied by Technogym and Trixter.

> The spa market is a competitive one and I didn't want ours to be just another hotel spa. I really wanted to create something destination-worthy

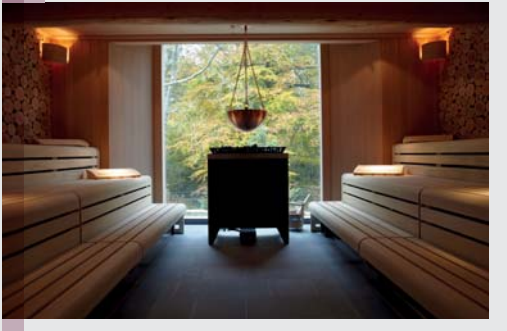
The treatment rooms include two signature couple's rooms: The Bath House, with an indoor double bath and private steam room, and The Bath Garden, with a private steam room and private garden featuring a double bath. The Herbery roof garden is planted with a selection of fresh herbs, which are used in both the treatments and in the food on offer at the spa's café. It will also be used as a space for outdoor yoga, tai chi and meditation classes, as well as evening barbecues and parties.

The original design was by David Collins, but was tweaked by the in-house design team at Lime Wood, and the fit out cost £7.5m. In keeping with the ethos that it should fit in with its surroundings, natural materials including slate and wood have been used extensively, and herb-filled planters are dotted throughout the building. Enormous windows provide views of the forest and allow masses of natural light into the pools, sauna and café, while pale greens and creams create a warm, uncluttered feel.

The Raw Bar café serves smoothies and champagne, as well as salads and raw and cured meats and fish. "In spas the food offering is often a bit of an afterthought," says Hutson. "We wanted this to be a strong offer in its own right.

"We converted a little building in the grounds to a smokehouse when Lime Wood first opened, which we were already using to smoke and cure our own fish and meat. We came up with this concept of serving raw and cured meats and fish, alongside salads that are prepared freshly in front of the spa guest. We wanted The Raw Bar to feel like a friend's kitchen, rather than a hotel restaurant."

The spa's interiors were designed by David Collins and Lime Wood's in-house design team. Natural materials including slate and pale woods have been used and large windows allow the forest views to take centre stage



Having decided that they wanted the spa's decor and treatments to be very natural, Hutson and his team began to look for suitable product houses. "We wanted products that were a bit different, that weren't available on the high street, that were from the British Isles and that were as natural as possible," says Hutson.

In the end the team settled on natural skincare brand NUDE, created by Fresh & Wild founder Bryan Meehan and Bono's wife Ali Hewson; Irish seaweed spa brand Voya; Ayurvedic specialists Tri Dosha; and Daylesford Organic's Bamford range. Herb House is the first spa to offer Bamford Body treatments outside of Daylesford's own Hay Barn spa in Gloucestershire, and it's something of a coup for Lime Wood. "It's a very happy relationship," says Hutson.

The spa's herb-planted roof provides a relaxing place for massages, yoga and tai chi (main picture above). The hotel is set within the New Forest

A BUSY YEAR AHEAD

"The year ahead should be a year of consolidation for Lime Wood," says Hutson. "It should be about getting the spa really well established. I'd like to see the membership properly bedded in – we're aiming for 400 members and currently have around 150. I'd also like to see the occupancy and room rate for the hotel climb."

Occupancy for 2010 stands at around 70 per cent, which Hutson says is "pretty pleasing for our first year" and the average room rate is about £240 net. Hutson says the hotel was suffering slightly from not having a spa, and he expects the opening of Herb House to drive bookings for the hotel.

"Where I think the spa will really help is with bookings during our off season and in the week," he says. "The hotel is already full at the weekends, but I'm enthusiastic about the spa really adding to bookings mid-week and during January, February and March. It very much completes the picture."

Hutson and the team are also keen to add half a dozen rooms to the hotel – "29 rooms is always going to be hard work," he says – and they have identified several areas in the grounds which would be suitable for these.

Also in 2011, Hutson and the team are set to redevelop Whitley Ridge, Lime Wood's smaller sister hotel, which Hutson says was suffering from a lack of investment.

The plans include a refurbishment of the 20 bedroom hotel and a relaunch which focuses on the hotel's reinvigorated kitchen garden. "We've come up with a pretty interesting concept which will bring the kitchen garden to the fore," he says. "We want to create a country house hotel with kitchen garden food. If that concept proves popular I think it could be replicated elsewhere."

After 35 years in the hotel industry, Hutson says he is still driven by a love of the business. He is happiest working for a small hotel group such as the Lime Wood Group, he says, where he can employ a personal, hands-on approach.

"We sold Hotel du Vin when we did partly because we had a good offer, but also because it needed a more corporate approach in order to expand the group further, and that just isn't me," he says. "I like running a business in a very personal, hands on way. I like knowing the name of every potwasher I employ and I like getting my hands dirty." ●

Since its launch in 1970, Glastonbury Festival has worked hard to minimise its impact on the environment and spread the green message. Green issues coordinator Lucy Brooking Clark tells Magali Robathan how it's still pushing boundaries today

GREEN FIELDS

What does your job involve?

My job is to co-ordinate Glastonbury Festival's green initiatives and push the environmental agenda. I concentrate on the areas where we have the most environmental impact and look at ways of lessening that impact and ensuring we are more sustainable.

What areas did you focus on for the 2010 festival?

One of the big problems we've had is festival-goers abandoning their tents and camping equipment at the end of the festival. People think the stuff they leave will go to a charity and get reused, but that's not the case – most of it ends up in landfill sites.

2007 was a very wet, muddy year, and lots of people left their tents. It was a big problem, and since then we've been trying to undo the damage and communicate to people that they have a responsibility for their belongings. We are trying to say to people: Don't just buy the cheapest tent, because it won't last. Buy a good tent and reuse it. In 2010 we used the big screens to communicate this message – we showed the aftermath of the festival, with all the abandoned tents, and flashed up the figures showing the number of tents that got left the previous year. This campaign made a big difference – in previous years there were around 5,000 tents left on the site, and in 2010 there were only about 700 to 800 left, so the message is getting through.

We also introduced more compost toilets and more solar showers in 2010, which were a big success.

What other environmental successes have you had?

The issue of water and sewage is a major one for us. With more than 175,000 people on site during the festival weekend, we create a lot of sewage and use a lot of water!

Prior to 2010, we had to transport all of our sewage up to Avonmouth,

SOLAR POWER IMAGES: SOLARSENSE

Worthy Farm, the site of Glastonbury Festival, now has the UK's biggest privately-owned solar power station. The team (above) unveiled the new system in November 2011. It features 1,100 solar photovoltaic panels.

FESTIVAL IMAGES: JASON BRYANT

which is around 40 miles from the site. In 2010, we put money into a local sewage works, and transported all our sewage there. This has had a massive impact on our carbon emissions. Also we put in a mains water supply so that the water was coming from the mains instead of being trucked in.

Another huge success for us was getting the company that supplies our nine mile-long perimeter fence to store the fence locally when it's not in use for the festival. Before, it was stored in Maidenhead, which meant 30 articulated lorries driving back and forth along the motorway to transport the fence to the festival site. We put pressure on the company and found several sites where the fence could be stored locally. They finally agreed to store it within a four mile radius of the site. This was a huge achievement.

Do you see the way people travel to the festival as your responsibility?

Absolutely. Half of the festival's emissions come from people travelling to and from the site, so it's a big issue.

In 2007 we sold 25,000 tickets on the proviso that the buyers had to come by public transport. The infrastructure wasn't quite there though, and we had issues with the coaches. The system wasn't great and it was a very wet year – people were left waiting in the cold and rain for too long.

Michael Eavis has always intended for Glastonbury Festival to be used as a means of raising awareness about political and social issues

In 2010 we did this again, but reduced it to 3,000 tickets to make sure we could get the infrastructure right. We used the big screens to show footage of people queuing in the car park and of people saying how much better it was coming by coach or bus.

It's important to reward people for coming by public transport, so in 2010 we introduced a subsidised single ticket for £5 from Bristol. We realised that a lot of people arrive at the fes-

THE HISTORY OF GLASTONBURY FESTIVAL

The Blues festival at the Bath & West Showground inspired Michael Eavis to begin a festival of his own, and the first festival – then called the Pilton Festival – was held in September 1970. Acts included Marc Bolan and Stackridge, and the tickets cost £1, which included free milk from the farm. Around 1,500 people attended.

During the 1970s, the festival was sporadic. In 1971 and 1979 it was organised by Bill Harkin and Arabella Churchill and in 1978 it was born from an impromptu gathering of travellers celebrating the summer solstice at Stonehenge.

In 1981 the name was changed to Glastonbury Festival and Michael Eavis took over the running of it. In this year, Eavis donated £20,000 to the Campaign for Nuclear Disarmament (CND) from the festival profits. From this year onwards, most of the festival's profits were donated to charities including CND, Greenpeace, Oxfam and Wateraid.

In June 2010, the fesitval celebrated its 40th anniversary. Tickets cost £190 and the site capacity was 177,500.

The first festival was held in June 1970, on the day after Jimi Hendrix's death. Glastonbury Festival celebrated its 40th anniversary in June 2010

tival by public transport, but get a lift home with friends, so it was important to offer flexibility by selling single as well as return tickets. We also organised a free cycle ride from Bristol to the site, led by experienced cyclists and with support vehicles following to transport the cyclists' bags and deal with any breakdowns en route.

For 2011, we have decided to put the price of the car parking up to £20, so that we can use the extra money to subsidise the public transport.

How do you approach the issue of energy use?

November 2011 saw the launch of Worthy Farm's new solar power system. More than 1,100 solar photovoltaic panels have been installed on the roof of one of the cowsheds. These can generate enough power to meet 80 per cent of the farm's electricity demand; any excess power will be exported to the grid.

We are trying to encourage some of the festival's smaller stalls that don't use much power to get their own mobile solar power units. We will probably encourage this by reducing their pitch fee. If they do this they'll then have their own power for all the festivals over the summer, which will save them money as well as saving power.

Which organisations do you work with?

We donate to Greenpeace, Wateraid and Oxfam. We work closely with Greenpeace on our green initiatives, using them to bounce ideas off and asking them detailed questions. We also get involved with Greenpeace's campaigns and use the festival to educate festival-goers about these issues.

How do you go about protecting the wildlife on the site?

That is closely monitored by the Environmental Health Organisation and Mendip Council. All the trees and wildlife are audited and we keep a record of how the land recovers. It's quite amazing, considering the intensity of the festival, how the biodiversity of the site replenishes itself very quickly.

We are committed to maintaining and increasing the high level of biodiversity on the site. One of the ways we do this is by protecting vulnerable habitats. In 2005 a temporary reserve was created for a deer that emerged in Hawkwell, by the pyramid stage. A three acre reserve was created, from which the deer emerged unscathed at the end of the festival.

Do you think the attitudes of festival goers is changing?

Yes, definitely. Sustainability is becoming much more mainstream. Glastonbury has a big reputation for its green initiatives – people take notice of what we do, which means we are really under the spotlight.

The main way that we approach things is to focus on the areas where we are least sustainable, and try to improve those areas.

Education is key and we are lucky in that we have such a great target audience at Glastonbury – people really want to learn how to lessen their impact on the environment. ●

Pulse celebrates 30 years of innovation

Chris and Dave Johnson, pictured with their very latest and first ever cardiovascular products

> "Local authorities and education bodies need help from the private sector now more than ever. We are well placed to support the new opportunities unfolding."

Thirty years of commitment and dedication by the Johnson brothers Chris and Dave now sees their Cheshire-based leisure business Pulse sitting proudly at the heart of the UK's fitness industry.

Formed by the brothers in 1980, their early endeavours saw them developing a range of fitness equipment for the rapidly-growing private gym market. They soon gained a reputation for quality and innovative design that has been the foundation of the business ever since.

As Dave Johnson recalls: "With our backgrounds in design and engineering we were able to instantly see ways of manufacturing equipment to be far more user-friendly, durable and cost-effective. We quickly formed partnerships with leading fitness industry experts, ensuring that we'd be able to offer our customers products that not only performed well, but kept performing well."

Three decades later and the Pulse philosophy still holds strong. As a key development partner with the IFI, Pulse offers more accredited commercial resistance machines than any other manufacturer, and with the launch of its new Fusion cardiovascular range at LIW last year, has raised the bar with revolutionary wire-free and interactive technology, designed and developed inhouse from its Cheshire headquarters.

The Pulse philosophy of questioning the norm led the brothers to start helping their customers in the refurbishment and development of their leisure facilities.

"We were constantly frustrated by delays caused by builders and architects and saw an opportunity to help speed up the process and bring in our own teams to do the work," says Chris Johnson. "Initially this was simply to help bring the equipment installation dates forward, but it soon highlighted a great opportunity to diversify and to actually design and build the facilities from the ground up."

With valuable design and build experience to add to its fast-growing list of services, Pulse pioneered a local authority partnership business model during the 1990s that has become the benchmark for joint-funded partnerships throughout the UK today. As with all things 'Pulse' it has been developed and improved to offer total flexibility. Now, 20 years after its first leisure centre development project, Pulse is working on an impressive portfolio of multi-million pound design and build contracts, including its first 5-a-side Soccer and Fitness complex, with more to follow in the next 12 months.

As Chris Johnson explains: "Our ability to bring funding to the table in today's economic climate, combined with a portfolio of case studies that demonstrate how our investment partnerships work, has led to a significant increase in the amount of projects we are currently undertaking. Local authorities and education bodies need help from the private sector now more than ever and we are perfectly placed to support the many new opportunities that are unfolding."

So 30 years on, with 150 employees, 4,000 customers and represented in 22 countries, are the Johnson brothers still as ambitious?

If you'd visited LIW last year and seen the largest stand at the show proudly displaying the four Pulse divisions – Pulse Fitness, Pulse Select, Pulse Soccer and Club Pulse – the launch of a revolutionary cardio range and an impressive array of interactive children's fitness products, the answer would have to be an emphatic Yes! It looks as though the Pulse commitment to providing a healthier future is as strong today as it was 30 years ago.

PULSEFITNESS.COM PULSESELECT.COM PULSESOCCER.COM CLUB-PULSE.COM

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PULSE FITNESS

When Pulse Fitness founders Chris and Dave Johnson developed a business plan to help local authorities convert squash courts into gyms, it was the start of something big. As Pulse Fitness shares its 30th birthday with Leisure Management, we speak to Chris Johnson about the company's journey

Can you describe the market when you launched Pulse Fitness?

Pulse began trading in 1980 – at this time we worked predominately with specialist private gyms selling free weight equipment. As the company quickly expanded, providing group fitness equipment to the public sector market, we recognised that not all leisure centres were operating at full capacity and that racquet sports were on the decline. Seeing an opportunity, we developed a business plan enabling public sector facilities to change squash courts into fitness suites.

How did Pulse Fitness evolve?

The company was formed by myself and my brother Dave. We had both qualified as design engineers, and our early endeavours saw us develop a range of fitness equipment for the rapidly-growing private gym market.

We soon began to offer additional services, and it was during the 1990s that Pulse pioneered a local authority partnership business model that has become the benchmark for joint funded partnerships throughout the UK today.

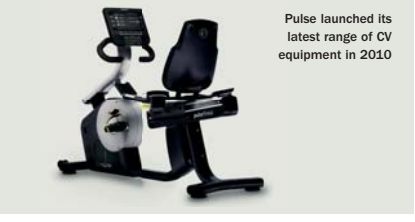
Now, 30 years on, with over 150 employees, 4,000 customers and represented in 32 countries worldwide, Pulse is the only UK-based company to offer a 'total leisure solution'.

How has the UK health and fitness industry changed over the past 30 years?

Thirty years ago the health and fitness industry consisted predominately of male-driven, private body-building gyms. Over the years we've seen an emergence of many different clubs from budget chains to women-only clubs and exclusive spas. The marketplace today sees health and fitness as a mainstream activity alongside other leisure activities such as going to the cinema or shopping.

The public sector marketplace has driven a significant change to the health and fitness industry from operating community swimming pools with racquet sport provision and maybe a single multi gym apparatus in the corner of a room, to offering a diverse range of wet and dry sporting activities ranging from fitness suites to thermal suites. The demand for better public sector facilities was driven by the need for local authorities to compete against the private gyms and by the change in government directives.

From an equipment perspective, the health and fitness industry has changed from supplying toning equipment such as dumbbells and benches to providing equipment that helps with weight loss and self-confidence.



Pulse launched its latest range of CV equipment in 2010

What have been the biggest challenges faced by the industry?

These include political changes affecting the economy, health and fitness budgets, sporting provision and health and fitness objectives and targets.

Competition has come both from the emergence of home fitness and from the volume of new clubs.

The demand for varied sporting provision housed in one location at an affordable price has also been a challenge.

What have been the biggest challenges faced by Pulse?

Changing our business portfolio to complement the demands and changes to the health and fitness industry. As a company we have evolved from supplying fitness equipment to designing, building, funding, equipping and operating a complete leisure facility.

Breaking into the global market with our fitness equipment was a challenge. Today we're proud to be operating in 32 countries, with prestigious global contracts such as the Marriott chain of hotels and Burj Dubai Towers.

What have been the biggest achievements and breakthroughs in the industry?

People's perception of fitness and health and fitness clubs has changed greatly. Influences from the media and the government, along with the quality of facilities at fitness clubs, encourages people to work towards a healthy lifestyle.

Advances in technology have helped the industry hugely. Today's generation of equipment is technologically-driven, and incorporates computer games and mobile phones to engage a new technologically-savvy consumer. Pulse has adapted to this change, introducing exciting interactive gaming solution Active Wall & Floor and the successful gym management software Smart Centre.

What have been the highlights for you personally?

For me, it's been the accomplishment of growing a British-based engineering company into an established technology-driven global leisure solutions company. I'm also proud that I've developed my skill set from engineering fitness equipment solutions to project managing large multi-million pound architectural/constructional projects.

What have been the key achievements for Pulse?

I'm proud of the investment we have made to ensure we have a strong UK operation. We still, to this day, design, assemble, install and service our own fitness equipment solutions from our offices in Cheshire.

We've just launched our fourth generation of cardiovascular equipment; another major achievement.

Building excellent relationships with private and public sector partners to deliver sustainable leisure developments is important to us; some of our customers have been with Pulse from the start back in 1980.

And finally, expanding our business portfolio to provide more than just fitness equipment. We're the only single operator that can provide operators a total turnkey solution, from funding, project management, pools, five-a-side soccer centres and full operational, sales and marketing support.

Part of Pulse Fitness' business involves developing cardio, strength, interactive, freeweight and group cycling products for the commercial fitness industry

What are the biggest challenges for the industry today?

Competition from two sides: from the emergence of home fitness and from the volume of new health and fitness clubs.

The other challenge is providing sustainable health and fitness solutions that cater for all ages and abilities – that will engage, motivate and encourage regular participation.

Are you optimistic about the future of the sector?

Yes! Whether people participate in exercise or not, everyone knows they should. We will see a rise in memberships at clubs, especially in the area of family fitness.

What are the biggest trends likely to emerge over the next few years?

At Pulse we are already seeing a shift towards family fitness. This will be the driving force for the sector, putting pressure on leisure facilities to provide an offering for the entire family.

The trend of technology fitness gaming will also continue to evolve over the next few years.

What are your plans for the next year or so?

We plan to continue to evolve to meet the change in demand, to offer a cost-free, sustainable, environmentally-driven total leisure solution business model. We will roll-out our Soccer and Swim concept business models to more sites. We also plan to further develop and integrate public sector/private sector partnerships. ●

VISIONARY TACTICS

4D cinema is going from strength to strength, while 3D is becoming increasingly popular for planetariums. Kath Hudson looks at some of the latest developments in this busy market

Although the economic climate has been tough over the last year, this hasn't dented the desire of many operators to invest in their attractions and many have looked at 3D, 4D and 5D experiences to up the ante and even help to regenerate an area.

Merlin Entertainments is currently working with Blackpool Council to restore Blackpool Tower to its former glory as part of a wider regeneration of the promenade. A 4D London Eye-style experience is planned, with the tower-top ride benefitting from a 4D pre-show telling Blackpool's story.

Simworx has installed the first 4D theatre in Wales at The Works, a regeneration project that's transforming the former steelworks at Ebbw Vale into a mixed-use development incorporating leisure, housing and other amenities. The theatre is currently showing a library of films, but a custom-made film – the working title of which is *How Green is Our Valley?* – is in production and will focus on local history.

Richard Benton, director of New Zealand's International Antarctic Centre in Christchurch, believes the 4D experience can be a powerful draw and put an area on the map. The centre brought 4D to New Zealand in November, with the launch of the cinema experience, Extreme. Benton hopes it will have a positive impact on visitor numbers. "Our market research tells us Extreme will conservatively add another 10 per cent growth in visitors in year one. This is an exciting goal in what has been a challenging 12 months," he says. "We were looking for a competitive edge, and 4D hasn't come to New Zealand yet, so we saw a niche in the market."

Simworx has provided the theatre and the film *Ice Voyage* has been custom-made by Emmy Award-winning cinematographer Mike Single and computer graphics production facility Animated Research Ltd.

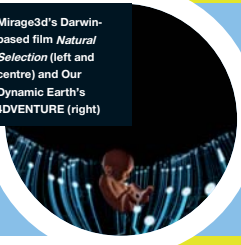
"We had to have a film that nobody else could access and we did this by making the first ever 3D movie actually filmed in Antarctica," says Benton. "We wanted real life, not animation. It had to be fun, exciting and it had to leave viewers wanting more."

Ice Voyage is a journey to Antarctica onboard a cruise ship that delivers incredible footage of the wildlife, icebergs and wilderness. But it isn't just a natural history film, there are some edge-of-the-seat moments – the 11-minute film has eight different 4D special effects and culminates with the cruise ship sinking.

AN EDUCATIONAL SLANT

Scotland's science attraction Our Dynamic Earth also launched a 4D theatre, 4DVENTURE, as this season's main attraction. Again, a bespoke film was commissioned, which could excite the audience while imparting an educational message. The curriculum-linked film, commissioned from NSC Creative, brings the visitors face to face with some fearsome creatures, while also giving the audience a greater understanding of the fragility of life on our planet.

Our Dynamic Earth chief executive John Simpson says: "Immediately from the launch of 4DVENTURE in April 2010, we saw an uplift in visitor arrivals, experiencing our busiest day in eight years over the Easter weekend. It has proven to have significant longevity as the snowball effect created by positive word of mouth and recommendations has grown. The initial performance has been sustained



Mirage3d's Darwin-based film *Natural Selection* (left and centre) and Our Dynamic Earth's 4DVENTURE (right)

nWave spent €5m (£4.16m, US$6.4m) on developing its *The Little Prince* 4D movie

and attendance figures for the summer 2010 were among the highest achieved since opening 10 years ago."

Other museums taking the 4D route include the RAF Museum in Hendon, London, which has installed a Simworx 4D theatre, showing *The Mission*, a story of a WWI bombing mission. The project is a revenue share scheme, with Simworx providing the capital costs for hardware and film licensing for a cut of the revenue. Also participating in one of Simworx's revenue share schemes is the Manchester Science Museum, which has installed a new theatre with 4D motion seats.

London's Science Museum used 3D attractions as the main draw for its flight season last summer. Centrepiece of the Fly Zone is a 3D motion effects theatre, Fly 3D, which creates an immersive experience of what it would be like to be a Red Arrows pilot. Produced for Metropolis Entertainment, by Impact Image and showing highlights of 2010's Red Arrows display, the 3D film is complemented by dynamic motion simulation, surround sound and the aroma of jet fuel. The IMAX cinema also has a new film: *Legends of Flight 3D*, produced by The Stephen Low Company with K2 Communications.

WORLD-LEADING PLANETARIUMS

Planetariums are also scaling up their offering to more dimensions, and whereas the norm has been to have a pre-recorded show, the trend in the new wave of planetariums is to have presenter-led live shows, capable of streaming data from observatories.

Global Immersion is involved in a couple of exciting projects, including the multi-million pound redevelopment of Moscow Planetarium into an international attraction. There will be two 4D theatres alongside the 3D planetarium; the 11-seat mini dome will be primarily educational, aimed at the teenage market, while a 47-seat theatre will show a range of films and will be able to operate as an attraction in its own right. The latter will be open late and has its own entrance. Both will have D-Box motion seats.

Global Immersion's international commercial manager, Ian Dyer, says it's an exciting project as the client is ambitious to create a flagship attraction for the city. "It will tick all the boxes: entertainment, educational, scientific and astronomical. There's an observatory next door and telescope data will be used in the dome."

Global Immersion is also working on the new Tainan Science and Education Museum, creating Taiwan's first 3D stereoscopic astronomy planetarium, which will open early in 2011. The planetarium will have a mainly educational focus and is a purpose-built building, next to an observatory. It will incorporate real time navigation with stereoscopic technology. "With more

Redstar's recently released Christmas production, *Sleigh Ride*

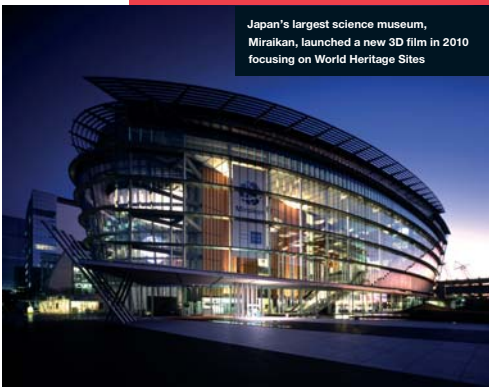
and more facilities integrating 3D technology, they're looking for something which will allow them to present live shows, so they can tailor their astronomy, or earth science presentation, to their audiences' needs, and for this to be capable of instantly streaming out 3D visuals," says Global Immersion's marketing manager, Beth Nicholas.

The Dutch-based Mirage3d has completed its second full-dome video planetarium film in stereo 3D, which will be shown at the Macao Science Center in China; the Hamburg Planetarium in Germany; and the Imiloa Astronomy Centre in Hawaii.

The 41-minute-long film *Natural Selection* tells the story of Charles Darwin's scientific discoveries, and explains the idea of evolution.

The film combines 3D action shots of characters, with 3D computer generated backgrounds. "It works extremely well in 3D, especially the underwater scenes, where there is an overhead environment with different layers of life forms all moving over the dome," says Mirage3d's Robin Sip.

Sky-skan, which has been busy installing planetariums all over the world, reports there is a definite trend for traditional planetariums to upgrade to full-dome video and a high quality optical star field. "In particular, China is adding several spectacular large theaters and asking for the latest and greatest technology," says marketing director Marcus Weddle. "In India, a large number of classical planetariums are now seeking digital upgrades. Audiences who haven't seen a planetarium show for a few years are simply blown away by today's shows. They have exciting visuals which the public still can't get anywhere else."



Japan's largest science museum, Miraikan, launched a new 3D film in 2010 focusing on World Heritage Sites

Japan's largest science and technology museum, Miraikan, launched a new 3D film last year, which incorporates images from DAICHI, the Earth's observation satellite. It focuses on three World Heritage Sites, in New Zealand, the Nile River in Egypt, and Japan's Itsukushima Shrine, and tells a story through the eyes of local children. Giant ruins and natural scenes are recreated with super high precision 3D images, taken by the 4K3D digital camera. Japanese company, GOTO Inc built the 3D system VIRTUARIUM II-3D, with Sony SXRD, and it is powered by Digistar4 from Evans and Sutherland.

COMPACT AND BIJOU

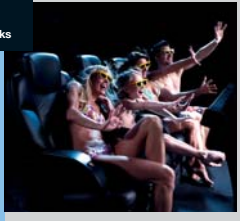
In response to demand, a couple of new products have come onto the market, which offer a 4D experience in a compact setting. Alterface launched its new 5Di concept at Asian Attractions Expo in Kuala Lumpur, last July. "On a limited footprint and easy to install, dismantle and move, the 5Di is a solution for parks and family entertainment centres, as well as shopping malls or bowling venues," says Benoit Cornet, CEO of Alterface.

Kinoton recently installed an open air 3D cinema on the grounds of a public swimming pool in Mönchengladbach, Germany. The Starpac Open-Air Cinema is showing 3D films including *Avatar, Alice in Wonderland, Forever Shrek*, and *Step Up*. Kinoton installed a DCP Digital Cinema projector and an XPand 3D shutter glasses system. "The XPand system is fast and easy to set up and provides lively 3D effects on the inflatable matte white cinema screen we're using," says Klaus Kraemer, head of the local Kinoton service team. "Because of the large picture size of 16 x 8m, we're using a very bright projector with a 6,500-watt xenon lamp."

Simworx launched its S-FX motion theatre at IAAPA. This is a fully enclosed 4D theatre with individual motion seats. Monkton says this has been developed mainly because of demand from projects in Turkey, which don't have large scale attractions.

These projects illustrate that 4D is marching across the globe. Simworx is even in talks with a company in Columbia about taking the experience there. Fortunately, the experiences can be easily refreshed with the library of films on offer. Redstar released its

(Below) Sky-Skan is working with planetariums; (right) Kraftwerk has developed a 4D/5D theatre for waterparks



THE FUTURE OF 3D

nWave's latest project is a 3D adventure film based on the book *The Little Prince*

Ben Stassen, CEO of nWave, gives his view of the next step for 3D and 4D cinema

"The future of 3D depends on the increase of the frame rate. If we don't do that, there's no future for 3D. It won't come to maturity until we increase the frame rate from 24 frames per second to 48 or possibly even 72. There are too many technical limitations with a slower frame rate. It would have a big impact on theme park attractions because we can make them much more dynamic in 3D once the frame rate is increased.

I hope it's going to take place in the next year or two – or 3D will be dead in the movie theatre. Because of the limitations with frame rates, many 3D films shown at the cinema are actually quite bad and it can't be used in action scenes. I saw a study in the US recently that said 37 per cent of moviegoers in North America already say they don't want to pay extra to see 3D and more than a quarter of moviegoers are saying they'd rather see the film in 2D. The danger is that this figure will only increase if quality isn't improved. We need to react and we need to do something very quickly.

When it does happen, because it will be expensive, there's a good chance that theme parks will be used as a pilot project for the higher frame rate before it's rolled out into cinemas, so our industry will be the first to benefit.

I am often asked why we do feature films in 3D and why 3D has found a new life in theme parks. 3D was around in the 50s and the 70s – it came and went. Then we started doing film-based 3D attractions in theme parks, museums and IMAXs and 3D became a revolutionary language of cinema. For the first time 3D was enabling film-makers to totally immerse the audience in the film and position the viewer within the film space itself. There's no better place in the world to see 3D films than in theme parks.

When we create a 3D film, we try to explode the frame around the picture, and make people forget they're watching a film – instead they're participating in the story. Our latest project is *The Little Prince*, which is based on a TV series of the famous book. Our story is that the little prince's rose has disappeared so he goes to three different planets to find it – the planet of time, the planet of music and the planet of the sleeping giant. The film's been designed to work well as both an immersive 3D and 4D attraction. We've designed many moments in the film, such as water spray and wind, for exhibitors who have physical effects in their theatres so they can programme them. There's no better way of taking the audience on a journey throughout space and into the fantastic world of *The Little Prince* than in 3D."

Christmas production, *Sleigh Ride*, for the 2010 festive season. This adventure saw viewers being splashed with slushy snow and smelling mince pies.

nWave launched *The Little Prince*, a 13-minute, 4D film based on the French novel by Antoine de Saint-Exupery at IAAPA in November. For CEO Ben Stassen, *The Little Prince* was an obvious subject choice. "The book sells between seven and 10 million copies a year worldwide. This gives operators who show it a big marketing advantage, as visitors already know the story and the characters," he says. "We spent E5m (£4.16m, US$6.4m) making the film, which is a huge amount for an attraction, and have really raised the bar with the animation."

Kraftwerk has developed a 4D/5D theatre which is aimed exclusively at waterparks/wet environments, where people can experience a 4D/5D attraction in swimsuits. The system looks similar but is totally different, as it needs to work properly and be long-lasting in wet environments with chlorine and other chemicals involved. The whole steelwork is high grade stainless steel, the entire electronics system is situated outside the auditorium and the speakers are waterproof. The theatre's films are mainly based on water and pirates themes. The first installation will open in spring in Aquapulco Bad Schallerbach, Austria, and more are currently in planning.

Kraftwerk has also recently signed a global partnership for distribution with Polin Slides from Turkey, which has a global network of more than 50 local representatives. ●

Grahame Senior takes a look back at some of the key developments of the past three decades, and argues that there are some real lessons for operators today

Thirty years on

How to do the things that work and avoid the things that don't

The French have a way of putting it – "plus ça change, toujours la même chose" (delivered with a Gallic shrug). A lot has happened in the last 30 years – but the old rules of good practice remain. Put your customers first, trust your staff and treat them well and embrace problems as an opportunity to build relationships. The leisure and hospitality business has one golden formula – let marketing build guest expectations and ensure that operations delivers an experience that exceeds those expectations.

I remember the very first National Visitor Attractions Conference at the Queen Elizabeth Centre. Then, as now, the whole thing was orchestrated by the inimitable Ken Robinson. Then, as now, there was a great deal of optimism and not, in my view, quite enough realism.

I remember delivering my own views on challenging times ahead. The increasing frustration of individual leisure travel on congested roads, the increasing lure of massive leisure/ retail complexes close to home and the rise of electronic in-home entertainment and information systems were all threats to the 'days out' UK leisure industry. Much of that has proved well founded (even though I did get some rather sharp words from the chair) but it hasn't all been doom and gloom. In particular, perhaps, the electronic revolution in data management and communication has been a hugely liberating force.

Everyone and everything is connected to everyone and everything and this has proved a superb boon for leisure operators.

Perhaps the biggest single change in the past 30 years has been the fact that communication is now so much more flexible and cost effective. The production of quality messages and graphic images through electronics is now so easy and affordable. Every operator with the discipline of accurate data collection and preparation can communicate very specifically to all their target markets. No longer do they incur huge supply and production costs as so much can be done in-house by media-savvy young staff.

For me, that freedom of communication is probably the single greatest empowerment for operators.

THE INTERNET REVOLUTION – **THE BEST THING EVER?**

I'm with the government's internet czar Martha Lane Fox – if you're not connected you're not empowered, whatever you do. The greatest change in both marketing and operating resources over the past two decades has been the internet. But you have to use it properly and embrace it fully. Gone are the days of your website being a fancy version of your brochure. Your website is your front door, your customer conduit, the first and most important welcoming moment you can give your customers.

The key rule is to remember who is in charge - they are! You don't even know they are checking you out unless you charm them and they take the next step to booking or contact. So, let your website reflect your chosen brand personality, make it open and easy to use and above all, be generous. Make not only your website but all your e-communication a priority and look for the young resources within your own team to manage and take responsibility for keeping it up to scratch. E-communication is strangely intimate and it needs the right touch to get it right – not an endless parade of terms and conditions to wade through. Paradoxically for such a hi-tech environment, effective e-communication also needs to be intensely human and appropriately friendly.

It's all out there to embrace.

Ensuring that your website is welcoming and clear is key

"A trip round Butlins shows just how far we've come" (above)

It's all in the demographics

Thirty years ago, the market was segmented into three components. Those three main segments, of course, were the young family market, the grey market, and the young adults ("yuppies", if you remember the 1980s).

Another big benefit of modern technology and data quality is the explosion in accurate demographics. We now know that markets are much more segmented than that. Each of the broad 'age/lifestage' categories is broken down into many different groups and types so that really accurate and intrusive communication becomes easy. Understanding exactly which market you should access at which season of the year and for which product is another massive empowerment to the canny operator.

A quality explosion

Another of the really big changes over this period has been the quantum improvement in quality in almost every sector. Budget hotels offer really excellent value for money, space and solid housekeeping quality for those who just want to use the accommodation for sleeping. The comfort, style and individual character available in the B&B sector has improved enormously. Media-driven market expectations and a big increase in middle-market affluence have driven standards very much higher.

Perhaps most of all, the food offering from gastro pub to gourmet restaurant seems light years ahead of what it was like in the 1980s. All of these changes have been driven by increased consumer awareness of what is possible and increasing consumer expectations of what should be delivered. It is no accident that decorating and lifestyle, cooking and entertaining programmes are frighteningly popular. They fuel the consumer expectations of ever higher standards in the leisure offering.

It mean operators have had to raise their game to an unexpected degree.

A trip round Butlins or Warner Leisure Hotels, or even the average holiday home park site, reveals just how far we've come since the days of Hi-de-Hi!

Standards and expectations change, core principles don't

In this brave new world of brighter and better product provision, the game, of course, remains the same – meeting and beating consumer expectations.

In rather the same way that Olympic performances and records seem to get better and better, the bar keeps being raised on the requirements for success in marketing and operations.

It comes down to understanding what your market wants, researching what your competitors are offering, finding the points of difference that give you an edge and delivering that USP consistently.

MARKETING AND COMMUNICATION

Seven things that will work in today's environment

1 A clear brand proposition defining you differently from the competition.
2 An accurate and up-to-date segmented customer database.
3 An individually targeted customer communication programme offering the right thing to the right people at the right time.
4 An inclusive and positive team development programme which shares responsibility and motivation.
5 An up-to-date website that reflects your character and puts the customer firmly in charge.
6 Developing a special relationship with your local market via PR and events.
7 Added value offers that reward loyal, regular customers.

Seven things that will not work

1 Following fashion rather than your own individual character and style.
2 Management by fear during the recession.
3 Not listening to your customers' feedback and ignoring their views.
4 Blanket impersonal emails and particularly e-newsletters.
5 Self-important communications that are all about you.
6 Inaccurate data-based communications, even down to Mr/Mrs/Ms. Get it right!
7 Cheap discount deals that attract people not in your target market; they will never come back and actually spend.

"Fish where the fish are.... and use the right fly"

Define your market, locate your market, excite your market. It remains as true today as it was when I used it as a marketing pitch to the Watneys (now Grand Met or Diageo), Whitbread (Travel Inn) or Ladbroke Group (Hilton) in the 1980s.

Use the 30-year advances of better information, cleverer and more affordable technology and above all better-trained, more-engaged staff to deliver a better-than-expected experience.

Then you will own your market. Then you can truly call it yours. ●

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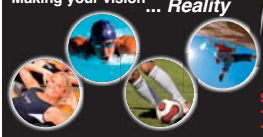

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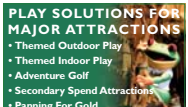

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JOHN ANDERSON

The new chairman of Humberts Leisure looks back at the winners and losers over 30 years in the leisure property market, and says a fond farewell to outgoing chairman Nigel Talbot-Ponsonby

Plus ça change, plus la même chose! In looking back over 30 years it's incredible to mull over the changes in the leisure market, but also it's clear that many of the underlying products remain amazingly similar. I had just started working in the sector 30 years ago, having joined Body Son & Fleury, one of the first firms of chartered surveyors to specialise in the UK leisure industry.

It's extraordinary to remember that in the early 1980s one could apply for planning consent for a caravan park by filling in a short form and submitting a site plan where the only details given showed the boundaries of the property. The same application today would require lengthy pre-application discussions, the preparation of numerous layout and landscaping plans, and tens of thousands of pounds spent on reports covering everything from transport impact to methods for protecting vagrant water voles. Of course this goes for all types of government control, with leisure businesses having experienced an immense increase in compliance and reporting requirements over the same period.

However this hasn't caused the industry to stagnate, since there have been some dramatic developments over the period. Merlin Entertainments wasn't even a twinkle in anyone's eye in 1980, and it was still a relatively small part of the Vardon portfolio in 1998. Now it's ready to challenge Disney on the international stage and is proving to be a great British success story.

In contrast, one company that most definitely was a major player in 1980 and yet has still changed beyond all recognition in the intervening years, is Whitbread. Not only is it one of the most successful players in 2011, but over the 30 year period it has become the Dr Who of the leisure industry, able to reinvent itself through entry into a new growth market, then bravely change again to meet the next challenge.

And then there's been the occasional unexpected phoenix that rises from the flames. By the 1990s many industry commentators had assigned Butlins to the pages of history; a sorry tale of lost markets and poor service. Yet 2011 sees the brand going from strength to strength under the entrepreneurial skills of the team at Bourne Leisure, with two stylish hotels up and running and more in the pipeline.

> "I believe the great success stories of the next few years are likely to be those leisure activities rooted in simple, authentic pleasures"

But despite all the successes, there's still one testament to the difficulties that can be encountered in turning a dream into reality. Back in the early 1980s we were promised an international leisure destination at Battersea Power Station. We're still waiting, although we wish the current owners well.

During the past 30 years, leisure property has earned a respected place within the broader investment market, and is regarded by many as an important element of a balanced portfolio. Equally, even in the current economic climate, private equity retains a substantial appetite for well-managed, asset-backed businesses. While bank funding is difficult to secure, Humberts Leisure has been involved with a number of successful re-financing projects for clients over the past 12 months, and we have even detected the early signs of a willingness to provide development finance, which would have been unthinkable recently.

What of the future? There will of course be increasing technological innovation, making leisure activities at home even more enjoyable and creating further challenges for the rest of the industry. However, for me, one of the most interesting developments of the last decade has been the increasing popularity of festivals and live events, and the greater emphasis on cultural and family activities. While technology will be important, I believe the great success stories of the next few years are likely to be those rooted in simple authentic pleasures, delivered with exceptional style and great service.

NIGEL TALBOT-PONSONBY

Finally a word about Nigel Talbot-Ponsonby, whose brainchild Humberts Leisure originally was.

He is without doubt one of the most important figures in the leisure property market over the last 30 years and he has had a very great influence on the way in which firms of leisure property advisors have developed. The advice he gives is treated with respect by his clients who hold him in high esteem – for his broad knowledge, experience and above all for his integrity.

Nigel expressed a wish to step down from the chairmanship of Humberts Leisure in the autumn, having steered the firm throughout its life and through the management buyout he led in 1991. He continues to be one of our number, and I look forward to benefiting from his continued presence within the firm. ●

DIARY DATES

24-25 JAN 2011

Live Events Forum

Twickenham Stadium, Middlesex, UK

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Radisson Blu Hotel , Stansted, UK

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31 JAN 2011

SAPCA Conference 2011

Holiday Inn, Stratford Upon Avon , UK

SAPCA's 13th annual conference is a key event on the industry calendar where members can get together with NGBs and funding agencies to examine the sport facilities construction marketplace. Olympian David Moorecroft OBE will chair the event, which will be followed by the Annual Dinner.

Contact Ian Beswick
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5-7 FEB 2011

The Pool, Spa & Lifestyle Show - SPATEX 2011

Brighton Hilton Metropole, Brighton, UK

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16-18 FEB 2011

Eurasian Parks and Attractions Expo EAAPA 2011

Crocus Expo Exhibition Centre, Moscow, Russia

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16 FEB 2011

Time to Trust

Shropshire House, London, UK

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Contact Brian Leonard
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17 FEB 2011

ISRM RoPPP Update Seminar

Lakes Leisure Kendal, Kendal, UK

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11-13 MAR 2011

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