

# Catering Concession Tender

The Savill Garden  
Windsor Great Park

## SCHEDULE 1b

BRIEFING & INFORMATION NOTES

LOT TWO

Virginia Water Pavilion & Mobiles

# Introduction

Windsor Great Park is an extraordinary place, and we are looking for extraordinary partners to work with us as we continue develop a world class visitor offering. Over the last seven years, we have been working hard to develop a range of different propositions and approaches which refresh the way in which we welcome over 5 million visitors a year to this iconic destination, looking at how we can offer them the very best in everything that we do, looking at how we become the place to visit. New facilities, refurbished buildings and, most recently, an industry leading new children's play area at The Savill Garden and a fully refurbished Virginia Water Pavilion are just examples of the work that has already been undertaken.

Catering plays a vital role in delivering a memorable visitor experience. We are looking to appoint only the best, a company whose creative flair and imagination, whose use of local produce, whose sense of theatre is all driven by an insistence on delivering the highest possible quality, which will deliver an end product that is fit for a Royal Park and reinforcing our unique position in Windsor.

This document provides some insight into the contracts being tendered and our aspirations for the service being sought.

## The Crown Estate

Dating back more than 260 years, The Crown Estate is a unique business with a diverse portfolio. We actively own and manage land and the seabed around England, Wales, and Northern Ireland.

The Crown Estate was established by an Act of Parliament in 1961. As an independent commercial business, we are tasked with generating profit for the Treasury for the benefit of the nation's finances. This has totalled £4bn over the last 10 years.

[www.thecrownestate.co.uk](http://www.thecrownestate.co.uk).

Our business is made up of four Strategic Business Units:

1. **London:** With a portfolio spanning 10 million sq. ft, we are one of the West End's largest property owners. Comprising Regent Street and around half of St James's, our offer extends across the workplace, retail, dining, leisure, and residential sectors. Our challenge is to become an urban renewal leader and support the rebuild of London post COVID-19, to ensure it maintains its relevance as a global city.
2. **Marine:** As the manager of the seabed around England, Wales, and Northern Ireland, we play a key role in enabling the UK's offshore wind industry, and facilitate the development of sectors such as cables, pipelines, CO2 storage, and marine aggregates. We work in partnership with our customers and stakeholders to help the country optimise the economic, environmental, and social potential of the marine environment, supporting its long-term sustainable development.

3. **Regional:** Our regional portfolio has a broad range of assets that includes retail and leisure destinations, as well as industrial and business parks. We also have a significant holding of mixed-use and strategic land opportunities. Our focus is on supporting economic development through reshaping and activating our portfolio for the long term. Currently the assets are 86% weighted to the retail and leisure sectors.
4. **Windsor & Rural:** The Windsor Estate (including Windsor Great Park, Savill Gardens, Virginia Water) extends to over 16,000 acres and is a working rural estate including forestry, horticulture, tourism, residential and commercial property activities. Windsor Great Park attracts approximately 6m visits a year – the Estate need to manage the balance of the need to protect the park with the public demand for access. This contract falls under this operating division of the Crown Estate.

We also hold over 125,000 acres of farmland across England, and more than 50,000 acres of upland and Commons interests across Wales and Cumbria. We are reviewing our rural holdings to assess both its potential for broader value and as an opportunity for environmental and ecological best practice.

## The Crown Estate - An Insight

### Our Purpose

In December 2021, we launched our purpose to create lasting and shared prosperity for the nation. Our purpose intersects what the world around us needs, and where we believe we can contribute. It sets out our ambition and the meaningful role we want to play beyond our return of profit to treasury.

We believe that we are more than 'rent takers' and want to shift to becoming 'value creators' where we seek to leverage our scale and convening power to make a meaningful difference and help to solve some of the shared problems faced by society.

Our purpose ensures that we deliver social and environmental value alongside financial return. We believe our role is to add real value today while also creating something better for future generations – some of our endeavours will be specifically for the long term.

### Our Values

Our values Caring, Together, Creative & Impactful define our culture and guide our behaviours, they also tell our stakeholders, partners, and customers how we do business and what they can expect from us:

**Caring:** We are committed to looking after the world around us and each other. That's why we are stewards: we seek to take care of people, reflect on our actions, and carefully consider long-term impacts. To leave a positive legacy for generations to come, we treat people, places and the environment with the care and respect they need to thrive.

**Together:** We work together and with others to deliver on our purpose. That's why we focus on building strong collaborative relationships with our customers,

stakeholders, and communities. To build trust, we focus on understanding the real needs of those around us.

**Creative:** We believe that creativity enables us to unlock new ideas and solve problems. That's why we strive for an inclusive culture where diverse perspectives and approaches are encouraged. To be a true catalyst for change, we embrace original thinking and the best ideas.

**Impactful:** We believe that positive impact and financial performance must go hand in hand. That's why we challenge ourselves to deliver the key social, environmental, and financial factors that underpin prosperity. In always striving to add value, we ask ourselves how our actions align with our purpose and make a meaningful difference.

### Our Corporate Strategy

Alongside the development of our purpose and values, we aligned our corporate strategy agreeing the following four strategic objectives:

1. Aim to responsibly generate value and financial returns for the country.
2. Be a leader in supporting the UK towards a net zero and energy-secure future.
3. Take a leading role in stewarding the natural environment and biodiversity.
4. Help create inclusive communities, supporting equality, economic growth and productivity.

A synopsis of our overarching sustainability strategy is provided as Appendix A. In addition, you can read more about these in our Annual Report:

<http://www.thecrownestate.co.uk/about-us/annual-report>

### Our Field to Fork Vision

Catering will be a celebration of British Food and Farming with a clear, defined and visible link of 'field to fork' principles utilising produce from the Royal Estates, the Client's tenant farmers and Windsor Farms produce wherever possible.

### Windsor Farms

The Royal Farms Windsor, now known as the Windsor Farms (WF), transferred to The Crown Estate on the 23<sup>rd</sup> March 2024. For many years the farming business was run as a conventional intensive farming operation with a traditional arable rotation and mixed livestock enterprises of dairy, beef, pigs and poultry.

In 2020, the farm converted to organic status (arable, beef and Dairy) and continues to run the enterprises, albeit with a significantly reduced arable enterprise, due to the requirements of rotational grass / clover leys in the organic rotation to increase nitrogen fixation. No artificial fertilisers or chemicals are used on the farmland under the organic system.

The Crown Estate also took on the Jersey herd of dairy cows at the date of transfer. This is one of the oldest Jersey dairy herds in the country, established by Queen Victoria.

All produce from the Windsor Farm (apart from milk) is sold via Windsor Farm Shop (WFS) ensuring strong local provenance of the food, “value-add” and very low “field to fork” miles. WFS has an extremely strong reputation in the locality and was the first of the “pioneer” farm shops opening in 2000. Milk is sold under contract to ARLA.

### Windsor Farm Shop

In 2000, HRH The Duke of Edinburgh opened the (WFS) in old potting sheds leased on a 50 year agreement from The Crown Estate. We are currently developing plans to comprehensively redevelop and refurbish WFS to be “best in class”.

WFS has a very strong butchery department, shop sales and the café. The brand value of both RFW and WFS is very significant and, allied with the synergies and ability to unlock secondary outlets for WFS produce at the Savill Building, Virginia Water and other local outlets, is very important.

The WF and WFS will enable The Crown Estate to use Windsor as a showcase of best practise for our new Rural Strategy where we are seeking to be an “exemplar of large scale sustainable, diversified and integrated agricultural and environmental best practice”.

We will be able to put into practice this strategy based around organic regenerative farming practices and to also offer our wider farming community across the Rural Portfolio the opportunity to sell their produce through WFS and to showcase the “Best of British”.

## LOT TWO – VIRGINIA WATER PAVILION & MOBILES

### Virginia Water Pavilion



Virginia Water is a man-made lake, located at the southern corner of Windsor Great Park. The Virginia Water Pavilion, opened in 2103, sits at the main public entrance to this open park and overlooks the Grade 1 listed landscape. It offers facilities for visitors to Virginia Water Lake, The Valley Gardens and the surrounding area of Windsor Great Park.

The building includes destination café restaurant, an enhanced adjoining kiosk offer providing hot and cold food throughout the year, public conveniences including baby-changing facilities, and acts as a centre for visitor information and support. The glazed seating area offers stunning views across Virginia Water Lake and give visitors a protected space during periods of inclement weather. A secluded wrap around terrace provides an attractive outdoor space with unparalleled views across the water.

The Pavilion was designed to be as sustainable a building as possible. Timber for the building was harvested on the Windsor Estate. Energy efficient LED lighting was installed throughout and additional features such as PV solar panel cells, a rainwater harvesting system and air source heat pumps were included. In March 2015, the building won a Civic Trust Award.

In 2021, the Pavilion underwent a transformative refurbishment and enhancement including the installation of new uprated electrical services, full climate control, new kitchen and production areas, new weather proof dog walking seating area, a retail kiosk and visitor centre and enhanced interior décor and furniture. This has radically improved both the popularity and positioning of the Virginia Water Pavilion and remains a firm favourite for both local residents and visitors to Virginia Water.



In addition, to support both the café operation and kiosk business throughout Windsor Great Park, a new dedicated storage area was constructed in the nearby car park comprising both ambient, chilled and frozen storage facilities. This complements the offsite container storage yard available near to Smiths Lane and Windsor Guards Polo Club.

## Current Service

The current service comprises a beautiful internal café with adjoining enclosed terrace seating and sheltered outdoor area (for dog walkers) together with a separate kiosk with a front facing external service counter.

## Cafe



The vision for the Café is to provide a lively, informal and welcoming British park café; a destination of choice for visitors looking for high quality, healthy, fresh food delivered with passion, energy and confidence. Celebrating the breathtaking and commanding views from all vantages, the Pavilion will be a flexible, convivial space which seamlessly blends alfresco dining, quick bites or refreshment, friendly gatherings or cosy intimate meals.

The new design has carefully considered how best to ineluctably draw customers into the space, communicate the style of service and allow them to migrate to a service counter once ready to order.





Service is designed to operate on a counter-ordered: table served basis, with the use of a state-of-the-art table tracking system to allow the service staff to readily take ordered food to the table whether inside or outdoors on the terrace. A QR Code ordering system could also be considered to augment this process.

An open kitchen allows the reinforcement of a fresh food, 'cooked for you' message to be conveyed to customers and for efficient operation, there is a clear route into and out of the kitchen for the delivery of hot food and clearing of tables. With the central and slightly removed service counter, this also ensures that kitchen activities do not encroach onto either customers queuing for service nor other catering staff preparing drinks.

The 'Fire Regulated' capacity of building stands at 70 individuals which naturally will limit the number of covers possible inside. However, a beautiful and enclosed, private outdoor seating and provision of shelter from rain and wind are also provided for visitors. In total, 135 covers are currently available.

Well-considered furniture choice and layouts are critical to creating the right ambience. The most popular tables are those facing out into the park and, as such, are flexible in their configuration and moveable. An eclectic range of alternative seating styles and banquette seating have added a level of 'comfort and ambience' to an otherwise aesthetically 'cold' space.

Another key consideration in redevelopment of the Pavilion was the inclusion of both climate control (heating or cooling) for different weather conditions and interventions to improve the acoustic performance of the space to create a relaxing and inviting environment year round. The interior design has been design to:

- Feel independent, not like a high street brand, not corporate
- Warm and cosy so that it appeals in the winter but open and airy in the summer
- Be focussed on the natural setting with focus on the extraordinary views
- Be contemporary and stylish
- Is inviting and relaxing

- Conjures a sense of place
- Reflects the fact that this is a daytime operation changing through the day sometimes from 8am-7pm
- Be appealing to a broad range of ages and nationalities

To raise and maintain the quality of the food and beverage service in the park, full food production facilities will be required at the Pavilion Cafe. The current kitchen facilities are difficult to operate effectively. The actual footprint is poorly configured resulting in many areas being undersized with the irregular shaped rooms further exacerbating this. In the new strategy, the Pavilion kitchen will need to support both this café and kiosk. It is important, therefore, that adequate facilities are provided to ensure that high quality products can be efficiently prepared for onward delivery to the other catering outlets.

#### Kiosk

Conversely, the kiosk operation prominently located adjacent to the main visitor pathway from the car park has been designed with the vision to provide a convenient take away kiosk close to terrace, park and entrance to carpark. Perfect for rehydration, relaxation and reenergizing. Coffee, Tea, Ice Cream and Snacks – simple but clear.

This is currently presented with a simple menu offer of hot and cold beverages (barista style), wrapped snacks, hand held hot food, cakes and ice cream. Customers order at the counter and are passed beverages and readily available snacks. Some limited hot food can be provided from the adjoining café kitchen.



#### Required Catering Proposition

The Crown Estate is entirely open to suggestions on the future configuration of catering services, menu offer and service style but the catering offer developed should be befitting of a Royal connection, take account of the socio demographic profile of the visitor mix and the reasons for visiting (largely for active exercise, dog walking etc.), maximise the turnover potential from the site and provide a strong financial return to the Crown Estate. Whilst new ideas are encouraged particularly related to the menu offer, it is important to iterate that, through the recent refurbishment and redesign undertaken, the current style of service is felt to meet this requirement and any significant changes to the proposed operation of the facility will require justification.

The Crown Estate would like to see a strong local influence within the menu with a celebration of locally sourced fresh food ingredients at the heart of the proposition. As

mentioned previously, the appointed caterer shall be required to use their best endeavors to procure a significant proportion of their ingredients from the Crown Estate and /or the Royal Farms at Windsor. Agreeable terms will of course be negotiated and, for tender purposes, bidders should anticipate their own purchasing terms.

The menu selection will need to address common dietary requirements, which may change over time, such as wheat intolerance, nut allergies etc. The Caterer shall be encouraged to stock ethically traded products wherever possible and economically viable. A high quality children's offer must be available at all times though this could be a smaller portions of the adult offer.

## Windsor Great Park – Kiosk Operations



Windsor Great Park represents a beautiful eclectic Royal Landscape surrounding Windsor Castle and is much appreciated by both local residents and tourists from wider afield.

Virginia Water was first dammed and flooded in 1753 and until the creation of the great reservoirs, it was the largest man-made body of water in the British Isles. The woodlands surrounding the lake have been continuously planted since the middle of the 18th Century. The Frost Farm Plantation (at the south-western end of the lake) is also a designated SSI (Site of Special Interest), thanks to its maturity and biodiversity.

There are reminders of the past throughout the grounds. The lake was once a place of pageantry and spectacle and home to a Chinese junk and fishing temples built on the shore. A trip to the south bank and visitors will discover an ornamental cascade from the 18th Century, and the Leptis Magna Ruins, a 'Roman temple' built from columns and lintels brought

from the ancient city of Leptis Magna in the early 19th Century. One of the area's more recent additions is a towering 100-foot high Totem Pole, a gift to HM The Queen from the government of British Columbia.

In 2013, The Crown Estate invested strongly in supporting the visitor experience with the addition of the Virginia Water Pavilion. This is an impressive structure fabricated by sustainable timber supplies from the Windsor Forest, offering improved visitor facilities to the area.

There are two main visitor car parks, the Virginia Water Car Park on the East Side adjacent to the Virginia Water Pavilion off the A30 and the Black Nest Gate Car Park on the South Side.

Adjoining Virginia Water, is The Valley Gardens located on the northern shores of Virginia Water offering some 250 acres of landscaped garden and woodland, twisting trails and pathways. It is best described as a flowering forest, mixing grassy meadows and exotic shrubs that have been liberally and continuously planted since the 18th century. Today, they promise some of the best views in the British Isles.

A walk in The Valley Gardens is a voyage of constant discovery. It still contains some isolated clumps of native oak, beech, sweet chestnut and Scots pine that were planted as far back as the early 1700s. Sir Eric Savill and Hope Findlay developed it further in the 1940s. Partly inspired by the garden's structure of parallel valleys, they decided to plant whole collections of particular plant groups together.

Today, it provides a home to National Collections of Magnolia, Mahonia, Pernettya, Rhododendron Species, Glenn Dale azaleas, hardy ferns, Ilex and Dwarf conifers. The most famous of the valleys is the Punch Bowl. A natural amphitheatre of multi-coloured azaleas, The Punch Bowl erupts into a riot of colour in early May. It is well known by locals and proves very popular with visitors.

Closer to The Savill Garden, is the Grade II Listed Cumberland Obelisk a spectacular and commanding architectural monument constructed in 1765 by King George II to commemorate the services of his son, William Duke of Cumberland 'the success of his arms and the gratitude of his father'. There are plenty of tables and seats dotted around the Cumberland Obelisk, offering vistas across the tranquil Obelisk Pond. For visitors with children, Obelisk Lawn has a play area, with a shipwreck and play equipment that's suitable for both toddlers and younger children.

## The Kiosk Locations

The key locations for mobile catering provision have been refined and developed over recent years and the current positioning has been seen to derive the best combination of visibility, access, service and, in turn, revenue. In summary, there are five key locations, namely:

- Blacknest Gate/South Car Park
- Leptis Magna Ruins



- Totem Pole
- Obelisk Lawns
- Valley Gardens

They are well spread out throughout the park and largely equidistant to each other. Visitors walking the circuit of Virginia Water and into The Valley Garden would, in theory, find some foodservice provision within say 20-30 minutes.

The location of these kiosks is visually represented on the map attached as Appendix "C".

### Blacknest Gate



Located alongside the main Virginia Water South Car Park and attracting a high level of passing traffic, the Blacknest Gate has carved a strong and loyal local following with customers choosing a refreshment on arrival or on their walks through the grounds.

### Leptis Magna Ruins

Most popular during the peak summer months with lawns leading down to the water's edge, this location is a popular stop off for an ice cream or cold drink.

### Totem Pole/Virginia Water South

Whilst close to the Totem Pole, this kiosk has been prominently positioned alongside a main thoroughfare and is highly visible to visitors walking in either direction to and from The Valley Garden.

### Obelisk Lawn



This full service kiosk is highly popular with families using the large children's play area on the Obelisk Lawn as well as visitors parking in The Savill Gardens car park. A range of picnic tables are provided for visitor's use. Considering the proximity of the nearby Savill Building with its full service restaurant and café facilities the Obelisk Lawn Kiosk is very popular throughout the year. Consideration is currently being given to relocating this kiosk to the opposite side of the lawn to allow a large rear compound area to be provided within the rear shrubbery.



## Valley Gardens



The Valley Garden kiosk is a seasonal kiosk operating when the Valley Gardens are in full bloom. The current provision is temporary and some consideration may be given in the future to create a more permanent kiosk utilising the historic 'Queen's Table Tennis Pavilion' which is currently empty and overgrown with shrubbery nearby. The offer is widened at peak times with a separate Ice Cream kiosk.

### Current Propositions

Careful consideration has been given to the level of provision made at each kiosk depending on the nature of the location and the need for either a full service kiosk where customers are able to procure a wide range of different sustenance needs or a more limited ice cream based proposition.

Currently two levels of provision are made in the kiosks but Crown Estates would consider alternative proposals if deemed appropriate:

- Kiosk A – Full kiosk service comprising Barista Coffee, Hot Drinks, Cold Drinks, Hot and Cold Snacks, Confectionery and other impulse purchases.
- Kiosk B – Limited offer comprising Ice Cream, Hot and Cold Drinks and Confectionery.
- Kiosk C – Limited offer comprising Ice Cream, Cold Drinks and Confectionery.

These are summarised below:

Blacknest Gate	KIOSK B
Leptis Magna Ruins	KIOSK C
Totem Pole	KIOSK C
Obelisk Lawn	KIOSK A
Valley Gardens	KIOSK B

## Opening Hours

**Minimum** opening hours are set out in the table below and will form part of the license.

Location	Minimum Opening Hours	Minimum Operating Season
Blacknest Gate	08.00- 16.00 GMT 08.00 -18.00 BST	Easter to September inclusive - 7 days a week October to Easter inclusive - weekends, bank holidays and school holidays only
Leptis Magna Ruins	10.00 - 18.00	Easter to September inclusive -weekends and bank holidays only At other times according to the weather
Totem Pole	10.00 - 18.00	Easter to September inclusive - 7 days a week At other times according to the weather
Cumberland Obelisk Lawn	08.00 - 16.00 GMT 08.00 - 18.00 BST	Open all year except Christmas Day - 7 days a week
Valley Gardens	10.00 - 18.00	8-10 week season depending on the Spring colour. Approximately early April to mid-June 7 days a week.

## Kiosk Utilities & Infrastructure

Given that the facilities are in remote park locations, it should be assumed that there are NO services provided including fresh water, drainage, gas or electricity. The appointed operator will need to ensure that suitable silent diesel generators, LPG gas (if necessary), potable water and contained drainage facilities are provided for each kiosk.

## Storage Support Yard

Located discretely within the forest area and flanking the Windsor Polo Ground is a shared service and storage yard. This can be accessed either off the walkways within the forest or via the road running towards to the Windsor Polo Ground Service Yard. The storage containers that are currently in situ are owned by the incumbent caterer but will be procured

by the Crown Estate directly if required by any change in operator. Tendering companies could consider providing a more level, hard standing area and surrounding fencing.

There is water, drainage and power in this area. These utilities are separately metered and recharged.

## Required Catering Proposition

The Crown Estate are keen to ensure that all its facilities and services continually evolve to allow quality, revenue and commercial return to be maximized over the longer term. The current provision/estate is wholly owned by the incumbent operator but, if required, could transfer to the Crown Estate's ownership for use by an incoming caterer if they do not have suitable mobile facilities.

In the medium term, The Crown Estate will be designing and investing into new bespoke kiosk designs and units which will be considered transformational in terms of kiosk design, scale, quality and service provision. The Crown Estate intend to ensure that all "mobile" units add to the Windsor Great Park brand within these prestigious and historically important locations. New kiosk designs would also, where possible, have fixed utilities to support longer term operations.

The Crown Estate is entirely open to suggestions on the product offered from the mobile kiosks but the operator should be cognisant of the positioning of the Windsor Great Park brand, the socio demographic profile of the visitor mix and the reasons for visiting (largely for active exercise, dog walking etc.) and tailor the product offer around this.

The Crown Estate would like to see a strong local influence within the menu with a celebration of locally sourced fresh food ingredients at the heart of the proposition.

The menu selection will need to address common dietary requirements, which may change over time, such as wheat intolerance, nut allergies etc. The Caterer shall be encouraged to stock ethically traded products wherever possible and economically viable.

The use of disposables is inevitable in some environments (the outlying kiosk operations) but the Crown Estate would like the caterer to minimize use of disposables where possible and when not possible to source environmentally friendly products such as bio degradable packaging.

## Historic Visitor Numbers

Visitor numbers are estimated using counters on the gates which track the number of car entering and a formula of 2.48 persons per car. There are approximately 1.2 million visitors passing Virginia Water Pavilion Building with 305,000 via the South car park at Blacknest Gate and 797,000 via the Savill Garden car park.

Whilst the Crown Estate are not actively targeting a significant increase in the annual visitor numbers, it is expected that visitor numbers will continue to rise. On peak trading days at weekends and during the holiday season, the car parks are operating at capacity. At certain times there is an extraordinary volume of cars and visitors, often resulting in closure of the car parks. However, there is very high volatility during the calendar year and for long periods the car park use is very light.

## Visitor Profile Data

Extensive customer research and profiling has recently been undertaken to better understand the visitor base that frequents Virginia Water and The Savill Building. This profiling captured socio demographic data as well as topics such as buying habits, value perception etc. We have extracted the information which we feel is relevant to the catering tender in Appendix "D". This is not an exhaustive list but a high level overview appropriate to this tender process. Information has been included on the Savill Building survey as this is close to the Obelisk Lawn though it is not known how many of these visitor use the Obelisk Lawn. There are some differences between visitors to The Savill Building and Virginia Water. A summary of the information is provided below:

### Virginia Water

- 18% of visitors are aged between 16 and 34, 16% between 35 and 44, 24% between 45 and 54 and 20% between 55 and 64. Only 16% of the visitor base is aged over 65. This is a very different profile to that at Savill Gardens with retirees forming a much smaller proportion of the visitor base.
- Social groups dominate the segmentation with over 70% visiting with a partner or friends and a large proportion are visiting with children (25%).
- Dog walking accounts for 39% of visitors to Virginia Water and represents an important and regular customer base.
- The high predominance of AB (60%) and C1 (24%) socio-economic groups mirrors the affluence of the surrounding area. This profile is lower than for Savill Gardens but still significantly higher than the national average.
- There is an overwhelming female bias (63%) in the visitor base.
- 71% of visitors are in full or part time employment. Compared to Savill Gardens only 25% of visitors are retired.
- The majority of visitors (95%) travel by car. 37% travel less than 15 minutes to Virginia Water and 44% travel between 15 and 30 minutes so propensity to spend

on refreshments will be more highly dependent on quality, price and positive experiences than in a venue a long way from home.

- Dwell time on site is high. Only 14% of visitors spend less than an hour on site, 53% spend between one to two hours and 33% spend more than two hours on site. These dwell time present a considerable opportunity for conversion to catering spend. The link to the outdoors and an active visitor (walking, jogging, dog walking, cycling etc.) also provides an excellent sustenance opportunity.
- There is a very high regular visitor base at Virginia Water with 29% of visitors visiting at least once a week and 51% at least once a month.
- Only 1% of visitors sited coming for lunch as primary motivation for visiting and 3% sited having a coffee as a primary motivation. However 5% sited having lunch as a secondary motivation and 27% sited having a coffee as a secondary motivation. Food and drink are clearly not the main drivers of visits currently but they do play an important secondary reason for visiting.

### Savill Building

- 44% of visitors are aged between 45-65 years i.e. the mid-life or 'working greys'. Over 65's account for 31% of visitors so the market is dominated by an older visitor base. This older profile visitor group have high expectations of quality in particular of service delivery which need to be nurtured if they are to become repeat visitors. However, there has been growth in recent years from groups visiting with children and this is expected to continue so the service proposition must accommodate a full range of demographics.
- Couples and family groups dominate the visitor profile with 56% visiting with a partner and 26% with children.
- The high predominance of AB socio-economic groups (56%) mirrors the affluence of the surrounding area. This affluent visitor profile is affirmed in examining the number of top of the range prestige or luxury cars, sports cars and SUVs in the parking lot at any one time. Customers are wealthy and have high demands and expectations of quality and experience.
- 55% of visitors are in full time or part time employment whilst 39% are retired on private pensions.
- There is an overwhelming female bias with a 66:34% split in the Savill Garden visitors, which needs to be carefully considered in the food propositions put forward.
- The majority of visitors (94%) travel by car. 36% travel less than 15 minutes and 39% travel between 15 and 30 minutes to The Savill Gardens so propensity to spend on refreshments will be more highly dependent on quality, price and positive experiences than in a venue where the distance from home is longer.
- Only 7% of visitors spend less than an hour on site. 43% spend between 1 and 2 hours, a further 36% spend between 2 and 3 hours and 15% send longer than 3 hours on site. There is clearly an opportunity for conversion with the right catering proposition, even from those who bring their own picnics.

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- Only 5% of visitors cited coming for lunch as primary motivation for visiting and 4% cited having a coffee as a primary motivation. However 17% sited having lunch as a secondary motivation and 25% sited having a coffee as a secondary motivation.



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## Historic Catering Sales Data

Turnover figures for the last three years are set out in Appendix “E”. These figures are net of VAT and include all catering sales within the building. There is includes a breakdown between the each of the key operating areas.

These figures are indicative of past performance and provided for information purposes only. They are not to be taken as any guarantee of future business. The tendering companies are required to make their own judgement regarding the potential of the site.

## License Period

The license shall run from 24<sup>th</sup> February 2025 for five years on a fully commercial basis wherein the appointed caterer shall pay a percentage of turnover to the Client as a concession supported by a fixed annual guaranteed sum. There will be an option to extend by two years at the discretion of the Client.

## Investment

Given the significant investment made by the Crown Estate over the last few years and the high quality of the existing fabric, no significant investment is anticipated to be required. Any specific investment that may be recommended to significantly enhance the catering proposition will be considered but will be made directly by the Crown Estate.

As mentioned previously, it is intended that all mobile kiosks will be replaced during the contract cycle with a design developed by the Crown Estate and their design partners in consultation with input from the appointed caterer. All investment in this regard will be made directly by the Crown Estate.

## Future Sales Forecasts and Profit and Loss Projections

The Caterer is required to provide sales forecasts for the duration of the license and profit and loss projections for the first three years of the license and provide these figures and the basis of the calculations as part of the proposal. In making the projections the tendering companies should assume a financial year of April to March such that the first year will be thirteen months.

## Financial Offer

Financial offers are sought from the caterer. These should be expressed as a percentage of sales (a tranching concession offer would be acceptable) with a minimum annual guaranteed sum.

## APPENDIX "A"

### THE CROWN ESTATE SUSTAINABILITY STRATEGY 2022

# Our strategy is driven by our purpose and draws upon our unique status to deliver lasting national impact



## Shifting to a more active mandate, each TCE Business Unit has a define role to help deliver our strategy, ultimately driving for direct and superior financial, social and environmental performance.

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Be a leader in supporting the UK towards a net zero carbon future



Help create thriving communities and renew urban centres in London and across the UK



Take a leading role in stewarding the UK's natural environment and biodiversity

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### Marine

Our role is central to supporting the delivery of the UK's net zero agenda, including growing offshore wind, carbon capture and hydrogen, as well as enabling the growth of domestic supply chains and skills.

### Regional

As technology and the pandemic have changed the face of retail, our focus is on transforming our regional holdings into a mixed-use offer, sourcing new industries, supply chains and customers and supporting regional growth and productivity.

### London

As one of London's largest property owners, we have a leading role to play in the renewal of the city post-Covid. This includes helping London retain its global city status, investing to achieve net zero and responding to the profound impact of technology on how people live, shop and work.

### Windsor & Rural

Become recognised as a leading UK rural estate and a centre of excellence for environmental and ecological best practice

As a significant national landowner, we have a role to play in leading the transition of agricultural land use in the UK. To address environmental and economic challenges, becoming an exemplar of scale, sustainable and diversified agricultural and environmental practice.

Through all of our activities we seek to promote economic growth and support improved productivity

# Our strategy delivers an ambitious set of long-term outcomes that can support the national policy agenda, drive economic growth across the UK and maximise returns to Treasury

## FINANCIAL IMPACT



- ❖ A 20% uplift in annual net revenue profit by 2032 compared to the status quo, equivalent to +£100m p.a.<sup>1</sup>
- ❖ Enhanced annualised profit growth of 6-8% p.a. over 10 years, **compared to our current target of 4%**
- ❖ **Managing the realisation of material levels of option fee income from offshore wind incl. Round 4**
- ❖ Enhanced return on capital, creating long-term value and optionality
- ❖ Total returns in excess of market forecasts

Strategic outcomes

## ENVIRONMENTAL IMPACT



- ❖ Support delivery of the UK's net zero targets
- ❖ Optimise use of seabed for the nation by unlocking:
  - 95 GW of OSW by 2050
  - C. 100 Mt/yr of CCUS stored by 2050
  - 35GW hydrogen by 2050
- ❖ Invest to decarbonise emissions from the development and operation of our significant real estate holdings, in London and across the UK
- ❖ Help lead the UK's transition to a sustainable agricultural future
- ❖ Invest to scale emerging national carbon and biodiversity net gain markets
- ❖ Invest to protect and enhance Windsor's ecological uniqueness

## SOCIAL IMPACT



- ❖ Support the development of sustainable jobs and new skills by investing in supply chains, empowering local communities and driving economic growth and productivity through our activities across the UK
- ❖ Nationwide potential to deliver c. 20k homes, significant business space and c. £8bn of development value
- ❖ Investment to drive London's long-term renewal, bringing visitors, shoppers & workers back to the West End post-Covid

1. This excludes option fees from Leasing Round 4

## APPENDIX "B"

### HISTORIC VISITOR NUMBERS



## Historic Visitor Numbers

	Building Footfall (Sensor Reading)	Virginia Water Car Park		Virginia Water South Car Park		Savill Garden Car Park	
		No. of Cars	Car Park Visitors *	No. of Cars	Car Park Visitors *	No. of Cars	Car Park Visitors *
<b>2021-2022</b>							
Apr-21	22,284	12,124	30,068	6,624	16,428	20,452	50,721
May-21	143,650	23,414	58,067	7,985	19,803	26,805	66,476
Jun-21	163,551	21,873	54,245	8,025	19,902	20,989	52,053
Jul-21	158,873	20,020	49,650	7,546	18,714	20,479	50,788
Aug-21	120,720	24,296	60,254	7,508	18,620	23,784	58,984
Sep-21	80,512	19,578	48,553	6,824	16,924	20,110	49,873
Oct-21	81,602	20,288	50,314	6,726	16,680	22,650	56,172
Nov-21	67,937	19,072	47,299	6,576	16,308	20,204	50,106
Dec-21	76,491	19,044	47,229	7,004	17,370	19,998	49,595
Jan-22	109,902	25,824	64,044	8,792	21,804	25,318	62,789
Feb-22	69,571	16,046	39,794	5,135	12,735	15,934	39,516
Mar-22	109,086	25,590	63,463	7,884	19,552	22,852	56,673
<b>TOTAL 21/22</b>	<b>1,204,179</b>	<b>247,169</b>	<b>612,979</b>	<b>86,629</b>	<b>214,840</b>	<b>259,575</b>	<b>643,746</b>
<b>2022-2023</b>							
Apr-22	129,428	26,299	65,222	7,917	19,634	26,843	66,571
May-22	123,062	25,867	64,150	8,004	19,850	24,725	61,318
Jun-22	106,252	19,473	48,293	5,849	14,506	22,362	55,458
Jul-22	102,445	26,297	65,217	7,441	18,454	20,507	50,857
Aug-22	115,702	29,390	72,887	7,837	19,436	23,835	59,111
Sep-22	89,899	18,943	46,979	3,563	8,836	12,262	30,410
Oct-22	108,591	27,125	67,270	10,711	26,563	28,701	71,178
Nov-22	70,098	21,367	52,990	6,728	16,685	22,027	54,627
Dec-22	75,361	20,003	49,607	3,617	8,970	20,087	49,816
Jan-23	109,902	26,810	66,489	7,560	18,749	23,555	58,416
Feb-23	69,571	20,808	51,604	6,820	16,914	23,519	58,327
Mar-23	109,086	22,432	55,631	4,515	11,197	23,291	57,762
<b>TOTAL 21/22</b>	<b>1,209,397</b>	<b>284,814</b>	<b>706,339</b>	<b>80,562</b>	<b>199,794</b>	<b>271,714</b>	<b>673,851</b>
<b>2023-2024</b>							
Apr-23	129,428	27,932	69,271	22,868	56,713	30,708	76,156
May-23	148,204	30,414	75,427	23,368	57,953	30,572	75,819
Jun-23	106,666	25,808	64,004	18,277	45,327	24,214	60,051
Jul-23	102,445	26,380	65,422	7,253	17,987	26,912	66,742
Aug-23	118,521	29,528	73,229	6,882	17,067	32,266	80,020
Sep-23	85,838	26,087	64,696	6,115	15,165	25,299	62,742
Oct-23	90,081	26,486	65,685	7,022	17,415	28,674	71,112
Nov-23	64,117	22,090	54,783	5,943	14,739	21,074	52,264
Dec-23	65,259	20,914	51,867	6,938	17,206	21,218	52,621
Jan-24	80,397	27,359	67,850	5,817	14,426	25,243	62,603
Feb-24	77,706	25,658	63,632	4,495	11,148	24,888	61,722
Mar-24	96,887	30,173	74,829	8,190	20,311	30,159	74,794
<b>TOTAL 23/24</b>	<b>1,165,549</b>	<b>318,829</b>	<b>790,696</b>	<b>123,168</b>	<b>305,457</b>	<b>321,227</b>	<b>796,643</b>

\* Based on average group size of 2.48 visitors per car

## APPENDIX "C"

### VISITOR PROFILE INFORMATION

## Savill Building/Gardens

Age Profile (Savill Garden and Virginia Water combined)	16-34	17%
	35-44	15%
	45-54	22%
	55-64	22%
	65+	24%
Gender (Savill Garden and Virginia Water combined)	Female	64%
	Male	36%
Party Composition	Alone	10%
	With A Dog	22%
	With Children	26%
	With Partner	56%
	With Parents	7%
	With Friends	22%
	With My Bicycle	1% (=144%)
Social Class	AB	56%
	C1	28%
	C2	13%
	D	3%
	E	0%
Modes Of Transport	Walked from home	3%
	Public transport	0%
	Car	94%
	Bike	2%

	Coach	0%
Travel Times	Up to 15 mins	36%
	15 to 30 mins	39%
	30 mins to 1hr	19%
	Up to 1.5hrs	3%
	Up to 2hrs	1%
	Over 2hrs	1%
Employment Status	Employed F/T	49%
	Employed P/T	6%
	Self-Employed	4%
	Retired (Private)	39%
	Retired (State)	4%
	Student	0%
	Unemployed (<6 Months)	0%
	Unemployed (>6 Months)	0%
	Not Stated	1%
Dwell Time	Up to 1 hr	7%
	1 to 2 hrs	43%
	2 to 3 hrs	36%
	3 to 4 hrs	12%
	4+ hours	3%
Membership Profile	Car park only	13%
	Friend or member	30%
	Neither (non-member)	57%
Membership Profile	Friends	37%

	Members	63%
Frequency Of Visit  (Overall to Savill Garden, from all people asked across Windsor Great Park)	First Visit  Most Days  3-4 Times A Week  Once A Week  Once A Month (Less Than Weekly)  Twice A Year (Less Than Monthly)  Less Than Twice A Year  Never	4%  1%  2%  5%  13%  16%  22%  37%
Primary Motivations for Visiting The Savill Gardens	Meet other mums  Have a coffee  Walk the dog  Have lunch  Meet friends  Family outing  Exercise  Visit The Savill Garden	1%  4%  17%  5%  7%  21%  30%  15%
Secondary Motivations for Visiting The Savill Gardens	Meet other mums  Have a coffee  Walk the dog  Have lunch  Meet friends  Family outing  Exercise  Visit the Savill Garden	1%  25%  4%  17%  11%  7%  9%  7%

## APPENDIX "D"

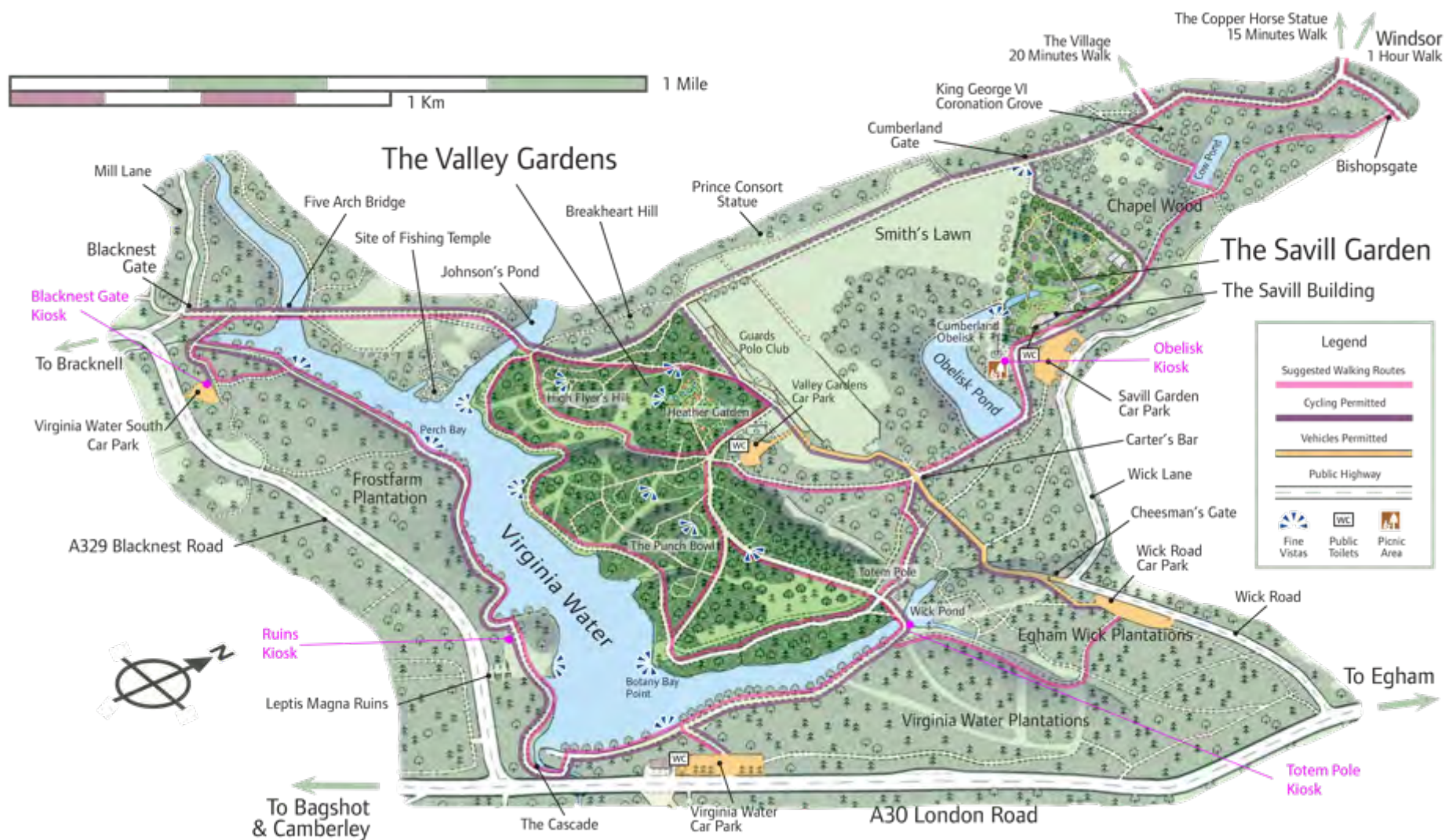
### HISTORIC SALES FIGURES



	Virginia Water Café	Windsor Park Kiosks								TOTAL VW & WGP
		Obelisk Kiosk	Totem Kiosk	Blacknest Kiosk	Valley Gardens Kiosk	Ruins Kiosk	Misc. 1	Misc. 2	SUB-TOTAL KIOSKS	
<b>2021-22</b>										
Apr-21	£9,001	£34,710	£43,135	£50,277	£35,933	£18,062			£182,117	£191,118
May-21	£34,705	£26,851	£31,695	£33,739	£28,461	£0			£120,746	£155,451
Jun-21	£50,086	£20,958	£21,309	£20,120	£12,151	£8,429			£82,967	£133,054
Jul-21	£71,470	£16,919	£19,714	£21,062	£9,682	£9,248			£76,625	£148,095
Aug-21	£102,087	£17,620	£21,872	£22,070	£9,116	£6,412			£77,089	£179,176
Sep-21	£85,275	£15,680	£12,541	£19,198	£11,455	£4,670			£63,544	£148,819
Oct-21	£93,727	£17,649	£8,065	£22,871	£16,479				£65,064	£158,791
Nov-21	£79,439	£15,375	£2,161	£16,716	£13,236				£47,487	£126,927
Dec-21	£82,970	£19,110	£0	£17,673	£10,700				£47,483	£130,452
Jan-22	£109,028	£19,355	£0	£24,587	£16,111				£60,052	£169,081
Feb-22	£69,907	£11,403	£2,752	£13,542	£7,885				£35,582	£105,488
Mar-22	£114,230	£15,799	£10,177	£21,897	£10,204				£58,077	£172,307
<b>TOTAL 21/22</b>	<b>£901,925</b>	<b>£231,428</b>	<b>£173,421</b>	<b>£283,751</b>	<b>£181,413</b>	<b>£46,821</b>	<b>£0</b>	<b>£0</b>	<b>£916,834</b>	<b>£1,818,759</b>
<b>2022-23</b>										
Apr-22	£109,958	£17,340	£21,549	£25,117	£17,951	£9,023			£90,980	£200,938
May-22	£103,105	£15,542	£18,346	£19,529	£16,474				£69,891	£172,996
Jun-22	£90,302	£15,040	£15,292	£14,439	£8,720	£6,049	£5,418	£4,549	£69,507	£159,809
Jul-22	£94,384	£14,979	£17,453	£18,646	£8,572	£8,188			£67,837	£162,222
Aug-22	£109,859	£17,391	£21,588	£21,783	£8,998	£6,329			£76,088	£185,947
Sep-22	£75,607	£12,981	£8,938	£14,664	£7,307	£2,524			£46,415	£122,022
Oct-22	£107,596	£16,466	£9,496	£18,803	£11,682	£1,816			£58,262	£165,858
Nov-22	£69,910	£10,107	£2,302	£11,538	£6,936				£30,884	£100,794
Dec-22	£68,307	£12,833	£0	£12,042	£8,201				£33,076	£101,383
Jan-23	£90,034	£12,738	£0	£16,426	£11,479				£40,643	£130,677
Feb-23	£93,354	£13,699	£3,708	£16,405	£10,948				£44,761	£138,115
Mar-23	£84,068	£9,758	£3,719	£13,718	£9,011				£36,206	£120,274
<b>TOTAL 22/23</b>	<b>£1,096,485</b>	<b>£168,874</b>	<b>£122,392</b>	<b>£203,110</b>	<b>£126,278</b>	<b>£33,929</b>	<b>£5,418</b>	<b>£4,549</b>	<b>£664,549</b>	<b>£1,761,034</b>
<b>2023-24</b>										
Apr-23	£119,842	£21,023	£18,839	£23,330	£16,625	£8,137	£1,306		£89,260	£209,102
May-23	£124,814	£23,836	£27,085	£24,160	£19,910	£8,881			£103,872	£228,686
Jun-23	£97,745	£15,154	£17,992	£17,444	£9,352	£6,147	£2,849		£68,937	£166,681
Jul-23	£104,700	£16,822	£12,889	£17,452	£9,114	£5,048			£61,325	£166,025
Aug-23	£121,139	£25,574	£19,229	£20,392	£11,947	£4,178			£81,320	£202,459
Sep-23	£101,611	£16,109	£11,093	£18,199	£9,069	£3,132			£57,601	£159,212
Oct-23	£132,417	£20,395	£11,553	£18,629	£13,801	£2,922			£67,300	£199,717
Nov-23	£78,064	£9,338	£1,587	£12,021	£8,346				£31,292	£109,356
Dec-23	£78,365	£17,362	£0	£13,511	£8,618				£39,491	£117,857
Jan-24	£103,458	£11,673	£0	£16,930	£11,350				£39,953	£143,411
Feb-24	£95,425	£11,494	£3,566	£15,508	£10,071				£40,640	£136,065
Mar-24	£121,965	£14,230	£10,452	£20,460	£9,011				£54,153	£176,118
<b>TOTAL 23/24</b>	<b>£1,279,544</b>	<b>£203,011</b>	<b>£134,285</b>	<b>£218,035</b>	<b>£137,214</b>	<b>£38,444</b>	<b>£4,155</b>	<b>£0</b>	<b>£735,145</b>	<b>£2,014,688</b>

## APPENDIX "E"

### WINDSOR GREAT PARK KIOSK SITE PLAN



## APPENDIX "F"

### VIRGINIA WATER PAVILION PLANS

See attached PDF File