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## EXCERPT FROM THE MINUTES OF THE INFRASTRUCTURE OVERVIEW AND SCRUTINY COMMITTEE HELD ON 21 OCTOBER 2004

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### IOS.123/04 HADRIAN'S WALL

The Tourism and City Centre Manager submitted report ECD.21/04 attaching a summary of the Hadrian's Wall Major Study Report.

Mr Bell then outlined the Study document, advising that the aim of the study was to assess the potential of Hadrian's Wall to support the regeneration of the North of England through the growth of tourism revenues and to deliver a new Vision for Hadrian's Wall – one that would inspire, challenge and deliver a step change in the contribution made by the Wall to the economies of the North of England.

He further advised that the Council's main involvement was through the Hadrian's Wall Tourism Partnership. That had been a happy and productive relationship, but the Partnership was scheduled to wind up in 2005/06. Arrangements are, however, being made by the two Rural Development Agencies to set up an organisational structure which will deliver the proposals outlined in the Study Report. A perception did exist that the current Partnership was mostly geared towards the North East but, since the majority of organisations were from that area, it was a reflection of the distribution of resources. The Hadrian's Wall Trail had also made a significant difference to the value of tourism.

Mr Bell then responded to various questions and issues raised by Members, including -

1. Whilst information on Carlisle package breaks was not directly available, all available tourism information (Tullie House, various attractions, etc) was included in the promotional material.
2. The lack of facilities (e.g. toilets) along the length of the Wall was a resource issue and Mr Bell would check to see whether the Countryside Agency was aware of the problem identified around Bowness. The Service Development Manager added that there may be scope to further improve the car park at Gilsland and locations for additional car parks along the Wall could be identified.
3. A Member expressed concern that the most was not being made of Tullie House in relation to Hadrian's Wall. In response Mr Bell advised that that had been taken on board through the proposals in the Tullie House Development Plan.
4. Referring to the marketing problems caused by the physical length of the Wall and the perceived competition between the main sites, a Member questioned whether financial incentives such as joint ticketing may encourage people to go from one site to another.

In response, Mr Bell explained that the Study was advocating that marketing should relate to the full package with each site being part of the 'Greatest Roman Frontier' story. All English Heritage sites operated on joint ticket schemes so that may help.

5. A decision had previously been made to play down Roman links in favour of the Reivers because they were perceived to be unique to the area. Was it now being suggested that a dual focus should be adopted or one in favour of the other, and did the capacity exist to undertake that?

Mr Bell replied that whilst Tullie House had clearly aligned itself with the Reivers, the City's overall marketing thrust had never diverted from the '2000 Years of Border History' theme. Material now was very much linked to Hadrian's Wall – a World Heritage Site and universally known brand. This approach had been clearly endorsed by the North West Development Agency through its Tourism Strategy. The City's marketing capacity is naturally directly linked to funding. Archaeology had helped to raise the profile.

6. Birdoswald is in the process of being handed over by the County Council to English Heritage which may impact on the Centre.
7. The capital development programme prepared by the consultants had an estimated cost of £56.25 million over a ten year period, but there was also a requirement for ongoing revenue funding. There was a need to know the financial implications of the City Council's involvement in Hadrian's Wall.

Mr Bell responded that currently the Tourism Budget had an annual contribution of £3,000 to the Hadrian's Wall Partnership. Money was not available for any development proposals which would require significant amounts of money. A dialogue needs to be established with the North West development Agency to ensure Carlisle gets the best deal possible.

The Economic Prosperity Portfolio Holder reiterated that no budget was specifically identified in that regard.

The Health and Community Activities Portfolio Holder added that the report would tie in with the Development Plan for Tullie House which would be coming to Committee and the Executive in the next cycle. The Roman Story ran through the Development Plan and the future of Tullie House and Carlisle's historic development was very well tied up with the Great Frontier Story.

8. State of the art hand held interpretative guides were being developed for our section of Hadrian's Wall, funded through the Rural Development Programme and Barclay's Regeneration Fund. These will be launched in the spring of next year.
9. Referring to the schedule for development a Member noted that the Mini Story Centre: Tullie House was included at Phase III. He questioned whether that would be in 5/6 years time.

Mr Bell replied that it needed to be tied into the Tullie House Development Plan and the Museum and Arts Manager was aware of that issue.

10. The City Council was not represented on the Tyne Valley Community Rail Partnership which was a shame. The rail link could be enforced with the re-opening of Gilsland Station.

In response Mr Bell commented that the Hadrian's Wall bus, although seasonal, was going from strength to strength. He would investigate the suggestion regarding the Tyne Valley Community Rail Partnership. The Health and Community Activities Portfolio Holder added that preliminary discussion had been held regarding a tourist/bus interchange at Haltwhistle.

RESOLVED – (1) That this Committee recommends to the Executive and Community Overview and Scrutiny Committee that the Tullie House Business Plan include a commitment and funding to highlight Hadrian's Wall from the City border to the Solway.

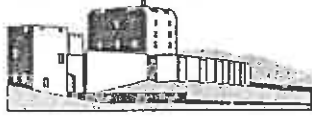
(2) That the Executive be further requested to consider –

- (a) Development of a short breaks package based on Hadrian's Wall;
- (b) Development of a package, in conjunction with short break guides, to include Hadrian's Wall;
- (c) the viability of enhancing the City's heritage on the Wall to the West;
- (d) the provision of facilities, including toilets and improvements at existing car parks, particularly at Gilsland;
- (e) providing a steer on action which could be taken to enhance North Cumbria and Carlisle District;
- (f) Investigate the potential for a bid to the North West Development Agency to develop the Solway, west of Carlisle.

(3) That the Community Overview and Scrutiny Committee be advised that a Member of this Committee would welcome the opportunity of attending that Committee when the Tullie House Business Plan was under discussion.



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# **INFRASTRUCTURE OVERVIEW AND SCRUTINY COMMITTEE**

## ***Committee Report***

**Public**

**Date of Meeting:** 21<sup>st</sup> October 2004

**Title:** HADRIAN'S WALL

**Report of:** HEAD OF ECONOMIC & COMMUNITY DEVELOPMENT

**Report reference:** ECD.21/04

### **Summary:**

A summary of the Hadrian's Wall Major Study Report is enclosed for Members' consideration. The Report's aim is to assess the potential of Hadrian's Wall and deliver the means to increase its contribution to the economies of the North of England.

**Contact Officer:** John Bell

**Ext:** 7260



# Hadrian's Wall Major Study Report



Summary September 2004







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## 1. INTRODUCTION

- 1.1 In April 2003, Economics Research Associates was commissioned by the North West Regional Development Agency and One NorthEast Development Agency to lead a team of consultants in undertaking a year long Major Study into Hadrian's Wall.
- 1.2 The aim of the study was to assess the potential of Hadrian's Wall to support the regeneration of the North of England through the growth of tourism revenues and to deliver a new Vision for Hadrian's Wall - one that would inspire, challenge and deliver a step change in the contribution made by the Wall to the economies of the North of England.
- 1.3 This document summarises the findings of the Major Study.

## 2. THE MAJOR STUDY PROCESS

- 2.1 The consultant team were guided throughout the Major Study by the clients and by a Steering Group made up of representatives from the main bodies involved in the management and running of Hadrian's Wall. The second Hadrian's Wall Management Plan provided a framework for the Major Study.
- 2.2 The Major Study consisted of four key stages; fact-finding, visioning, the development of the strategy and the testing of the strategy. At each stage of the process, findings and recommendations have been presented to the clients and the Steering Group, in order to gain agreement prior to moving forward to the next stage.

## 3. CURRENT STATUS OF HADRIAN'S WALL

- 3.1 The fact-finding stage of the Major Study was focussed on reviewing the current status of Hadrian's Wall, in order to determine the key issues and the potential opportunities.
- 3.2 Representatives of key stakeholder organisations were interviewed to determine their views on the strengths and weaknesses of the Wall and their visions for the Wall's future. In addition, consumer research was conducted amongst both current and potential visitors to the Wall to understand their current perceptions of the Wall and to identify any barriers to visiting the Wall. The consultant team also made site visits to the museums and heritage sites along the Wall.

### Lessons from Consumers

- 3.3 Expectations of Hadrian's Wall range from the views of the locals that it will be just the same as it was when they were at school, so why bother returning, to the feeling amongst non-visitors that it is just a Wall, with not enough there to warrant a visit. Previous visitors remember the Wall by the individual sites that they visited.
- 3.4 Amongst those that do visit the Wall sites, expectations of the experience are modest. With low expectations among visitors the actual experience is perceived fairly positively. However, it is seen to be an experience that is 'what you make of it', requiring a high level of effort from the visitor and is not seen to have the sort of 'wow' factor that leads to recommendations to friends and family to visit.
- 3.5 Generally, the standard of interpretation at the sites is seen to be poor, with little effort being made to link the sites together within the context of the bigger Hadrian's Wall story. Sites that have invested in the interactive forms of interpretation, such as Segedunum, are positively viewed for their ability to bring the story to life; however most sites are seen as being rather tired.

- 3.6 The lack of any focal point to help visitors understand how and where to access the Wall experience is a major barrier to attracting new visitors.

#### **Lessons from Stakeholders**

- 3.7 The stakeholders have a strong belief in the potential of the Wall, but recognise that significant improvements are required, not only to the product but also to the supporting infrastructure, in order to deliver a step change in the approach to realising the potential of the Wall.
- 3.8 The need to persuade local businesses and communities of the benefits that tourism can bring was felt to be key to achieving these improvements. This is in order to encourage growth in supporting infrastructure and to persuade existing tourism services providers of the need to provide high quality services at the times and locations required by the visitors.
- 3.9 The stakeholders also expressed concerns about the organisational set-up. Existing arrangements were seen to be too large and unwieldy, due to their requirement to represent the interests of all the partners involved. No clear authority had been given to any one organisation and as a result, it was felt that there was no one taking an overall lead on the management of the Wall. Existing sources of funding were seen as having too great an influence on activity, with this not always seen to be consistent with the interests of the Wall.
- 3.10 A further area of concern flagged by stakeholders was the new Hadrian's Wall Country branding developed by HWTP. Despite the involvement of many of the stakeholder organisations in the consultation process undertaken by HWTP in arriving at the new branding treatment, it was felt that the new treatment had not helped move the Wall forward.

#### **Current Visitor Volumes**

- 3.11 The consultant team estimate that there were 776,000 visitors to Hadrian's Wall in 2003. Of these, 458,000 were visiting the museums and historic sites along the Wall, on average each visiting 1.3 sites. A further 31,000 visitors were estimated to be serious walkers, walking in excess of two hours (but not visiting any of the sites), and 287,000 were estimated to be general sightseers visiting the area, but neither visiting the sites nor taking a long walk.

#### **Available Markets**

- 3.12 Typically, people travel for up to two hours from their place of residence for day trips from home, and for up to one hour from their holiday base for day trips when staying away from home. ERA's standard definitions of available markets are normally based on these drive times. However, due to the linear nature of Hadrian's Wall, ERA have estimated the one hour drive market as being any point within 40 miles of the line of the Wall, and the two hour market as being any point within 80 miles of the line of the Wall.
- 3.13 In total 4.3 million people live within 80 miles drive of the length of Hadrian's Wall. Of these, 2.4 million are within 40 miles drive and 1.9 million within 40 to 80 miles drive. Both populations are relatively low compared to other locations within the UK, reflecting the need for the Wall to attract new visitors into the region in order to avoid substitution from existing visitor offers.
- 3.14 There are already some 5.0 million tourists staying within 40 miles drive of the length of Hadrian's Wall. Most of these, 4.4 million, are domestic tourists. Whilst this tourist market is relatively strong for a UK region, the majority of tourist visits are currently made to locations other than Hadrian's Wall, to Cumbria, for the Lake District and to the City of Newcastle.

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## 4. LESSONS FROM COMPARABLE DEVELOPMENTS

- 4.1 In addition to reviewing the current offer at Hadrian's Wall, the consultant team undertook research into a number of comparable locations worldwide, identifying any lessons that might be learnt, either from their development history or their operation performance, which might benefit the Major Study when considering possible options for the future of Hadrian's Wall.

### Key Lessons

- 4.2 The research identified a number of locations that had faced similar challenges to Hadrian's Wall in their need to develop effective partnership working. The locations that were most successful at managing this were those where there was a formal central organisational structure with devolved powers.
- 4.3 A number of locations had managed and co-ordinated the development of the visitor experience to ensure that individual museums and visitor attractions within the location presented a different facet of the overall 'story'. In each case this was felt to improve the visitor experience and to encourage visitors to go to more than one site.
- 4.4 Umbrella marketing, presenting a location in its entirety, was felt to have a greater impact on visitation than would be the case if each of the museums and visitor attractions marketed themselves individually. It was also felt that such marketing enabled the sites to reach a broader audience. This was particularly the case for locations where the individual sites were very small, so not able to afford to market themselves effectively.

## 5. THE VISION

- 5.1 The second stage of the Major Study was the development of a vision. There was a need for a clear and motivating Vision for Hadrian's Wall to help guide all the partners in their actions in delivering a world-class experience for the visitor. Once agreed, the Vision needs to become the central guide for everyone who has ownership of some or all of the visitor interaction with Hadrian's Wall.
- 5.2 The Vision for Hadrian's Wall was arrived at by following an established process evolved by branding specialists, Brand Vista. The process started with a Visioning Programme to develop a draft Vision. This included a workshop, which was attended by the study clients and representatives from key stakeholder organisations.
- 5.3 The draft Vision was then tested with a wider stakeholder audience, through a series of workshops. The workshops also included discussions on what the implications of implementing the Vision might be for the Hadrian's Wall visitor offer, its organisation and its supporting infrastructure.
- 5.4 Crucially, the Vision was also tested amongst consumers at selected locations in England and Scotland, through group discussions. The discussions focussed on what best differentiated the Hadrian's Wall experience from other leisure offers, and what aspects of the Wall experience were most likely to motivate incremental visits to the North.

## Agreed Vision

- 5.5 The findings of the testing of the Vision and the consultants' recommendations for the Vision are set out below

AGREED AUDACIOUS GOAL	To move Hadrian's Wall from a Northern 'ought to see' to a Global 'must see, stay and return for more'
AGREED POSITIONING	The 'Greatest Roman Frontier'
AGREED PERSONALITY	Authentic, Welcoming, Captivating and Audacious

## Implications of Vision

- 5.6 The Vision is ambitious and presents challenges that the Wall's organisational structures will have to tackle. There is a need for these structures to be suitably constructed to be capable of directing substantial capital investment budgets and managing the future direction of the Wall.
- 5.7 In order to achieve the Vision, there is a need to create a cohesive visitor experience that can deliver the 'Greatest Roman Frontier' positioning. It is recognised that this will require substantial capital investment. The complex layout of Hadrian's Wall presents two main challenges to achieving this experience.
- 5.8 First, the physical length of the Wall means that the main visitor sites are geographically disconnected from each other, limiting the potential for visits to more than one site during a single trip. In addition, Hadrian's Wall is fragmented and has weak linkages between the individual sites, making it difficult to consistently communicate all that the Wall has to offer its visitors. There is a need to join up the story in order to present a cohesive experience.
- 5.9 Second, the main sites are owned and operated by different organisations, each with its own style of presentation and quality of interpretation. Currently, there is a degree of perceived competition between the sites and an emphasis on site-specific aims that might prevent the integrated approach required to successfully implement the 'Greatest Roman Frontier'.
- 5.10 Recommendations for developing the visitor experience are set out later in this document. However, there is also a need to develop the supporting visitor infrastructure, to enable a growth in tourism revenues and to optimise the benefit achievable from the development plan. Whilst the detail of this requirement is outside the scope of the Major Study, it does recommend that attention be paid to supporting visitor infrastructures alongside the implementation of the proposed development plan.

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## 6. STRATEGIC OBJECTIVES

- 6.1 The third stage of the Major Study was the development of the strategy to deliver the Vision. The objective is to develop a strategy that delivers the positioning the 'Greatest Roman Frontier' in a manner that supports economic regeneration in the North of England through sustainable growth in tourism revenues and that does so within the framework of the second Hadrian's Wall Management Plan.
- 6.2 The strategy needs to take cognisance of both this overall requirement for Hadrian's Wall and the more specific requirements of the three sections within the WHS (the urban Tyneside section, the Central Section and the West Cumbria section).
- 6.3 In addition to being the most developed, and the best-recognised part of Hadrian's Wall, the Central Section passes through landscapes that are highly sensitive environmentally. The strategic objective for the Central Section is therefore to grow visitor revenues to the area in a manner that recognises and addresses existing, as well as potential future, visitor management issues.
- 6.4 The section of the WHS which lies in Cumbria is far less developed, and includes the Roman sites along the West Cumbria coast as well as the urban Tullie House site. Currently consumer awareness of Hadrian's Wall is largely focussed on it being just a Wall, with the majority of consumers having some concept that the Wall stretched from the West to the East coasts of the country. As a result knowledge of the links between the coastal excavations and Hadrian's Wall is largely limited to Roman specialists.
- 6.5 The strategic objective for the Cumbria section is therefore to establish the connection to Hadrian's Wall, and the role of the coast as part of the 'Greatest Roman Frontier', and to ensure that there is sufficient critical mass of related visitor experiences there to justify this link.
- 6.6 The urban Tyne and Wear section includes two popular visitor sites, Segedunum and Arbeia, together with the less well-visited Museum of Antiquities. There are existing plans to re-site the Museum of Antiquities collection within a new, much larger museum in Newcastle. The working name for the new museum is The Great North Museum. The strategic objective for the urban Tyne and Wear section is to drive benefit to existing and planned sites by establishing them as part of the 'Greatest Roman Frontier', with the aim of broadening their visitor market.

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## 7. ORGANISATIONAL STRATEGY

- 7.1 The primary role of the organisational support structure for Hadrian's Wall is to become the responsible body for delivering the Vision. The new Vision is by definition all encompassing; therefore the structure needs to be capable of addressing all activities that concern the delivery of this Vision. Significant changes are needed to deliver the required step change in approach that will realise the potential of the Wall.
- 7.2 In order to ensure a high quality experience, the structure needs to have a capability that encompasses:
- The effective conservation of the Wall and its setting
  - Co-ordination of ongoing archaeological and historical research into the Wall
  - Future product development along the whole Wall, including developing, implementing and co-ordinating the interpretation and education strategy, and improving the visitor experience.
  - The marketing of the Wall locally, regionally, nationally and internationally
  - The proper management of visitors on the ground.

## 8. RESOURCES AND FUNDING

- 8.1 The capital development programme prepared by the consultants has an estimated cost of £56.25 million over a ten year period. Analysis of the funding estimates needs to be undertaken and the suggested development plan components prioritised but it is suggested that they could be funded as follows:
- ERDF (NB. The current Objective 2 programme finishes at the end of December 2006, when all grants need to be approved and contracts let with a view to all ERDF expenditure being defrayed by end 2008)
  - The Heritage Lottery Fund
  - English Heritage
  - National Trust
  - RDA Single Programme monies through the local strategic partnerships
  - RDA Regional Funds
  - Local Authorities
  - Charitable donations
  - Private Sector
- 8.2 It is expected that revenue will be generated to support a new organisational structure from the new developments they create. However, it is likely that an on-going operating subsidy will be required, to cover the provision of their activities and the costs of conservation heritage and environmental management.
- 8.3 As a national monument in a unique mainly rural/coastal setting, the Wall will probably continue to rely on national funding via English Heritage, the Countryside Agency and others - as at present.

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## 9. INTERPRETATION AND PRODUCT DEVELOPMENT STRATEGY

### Strategic Requirements

- 9.1 The core product development objective is to elevate Hadrian's Wall's profile using the 'Greatest Roman Frontier' story as a unifying theme. We believe that the 'Greatest Roman Frontier' positioning will enable Hadrian's Wall to achieve the international recognition it deserves, by creating a link between the Wall's main visitor sites, creating a more cohesive visitor experience and encouraging repeat visits.
- 9.2 The current product provides a sound foundation to build upon. By applying the 'Greatest Roman Frontier' positioning, we can create a more cohesive story-based presentation that should motivate incremental visits to the Wall. Importantly, this approach would help Hadrian's Wall's stakeholders to strike a better balance between increased visitor attendance and resource protection.
- 9.3 In arriving at the development plan recommendations the consultant team have considered the following needs and requirements;
- Build on the strengths of the existing sites and invest in what already exists
  - Raise Hadrian's Wall's overall profile
  - Increase visitor interest in Hadrian's Wall using the 'Greatest Roman Frontier' story as a unifying theme
  - Address the current barriers to visiting the Wall such as lack of public awareness, traffic and parking problems, lack of connection between the main sites and the Wall, limited interpretation and a lack of differentiation between the main visitor sites
  - Implement the strategy over several phases to allow for sustainable product development and appropriate market growth. The requirement to increase the overall appeal of the 'Greatest Roman Frontier' must be achieved in a way that does not detract from existing sites. Careful phasing would ensure that the existing sites are strengthened early in the process. Also, the phasing of product upgrades should provide a programme of news that will build awareness of the 'Greatest Roman Frontier' and encourage increased attendance
  - Collaboration by all Wall operators, partners and stakeholders would be critical for effectively implementing the 'Greatest Roman Frontier' positioning

### Recommended Development Plan Components

- 9.4 To augment existing structures and assist in managing the flow of the visitor experience, the consultants have recommended that several components be added to the current visitor experience. They propose five main product components, which together will help to increase public awareness, deliver the overall 'Greatest Roman Frontier' Vision to guests, and improve existing facilities. They also propose three supporting components that would assist with logistical issues and communications.

#### 9.5 The main product components are:

- ❑ 'Greatest Roman Frontier' Preview Centres to increase public awareness. These are intended to reach potential visitors who might not have previously considered visiting Hadrian's Wall, but who are close enough to the Wall that they could visit. Three or four Preview Centres are proposed, situated in locations with the highest visitor throughputs
- ❑ 'Greatest Roman Frontier' Story Centres to present an overview of the Wall story and to intrigue visitors to explore the existing Hadrian's Wall visitor sites, in particular those sites close to the Story Centre. Mini Story Centres would be located along the length of the Wall, as part of improvements to existing sites, or the development of new sites, in Newcastle, Carlisle, Maryport and Ravenglass. A larger Story Centre would be located in the Central Section
- ❑ Main Story Centre and Central Transport Hub, linked to the Central Section Story Centre, providing an interpretive bus tour service to five of the rural Hadrian's Wall sites, aimed at reducing the traffic impact of visitors in an area of sensitive landscapes
- ❑ Upgrades to the existing sites to improve the visitor experience. To include quality and consistency upgrades, to improve standards and connect the sites to each other and to the 'Greatest Roman Frontier' story, and product upgrades to differentiate the sites and bring the 'Greatest Roman Frontier' experience to life
- ❑ New Attractions to enhance the offer and attract repeat and new visitors, supporting existing attractions rather than detracting from the existing visitor offer. The recommendation is to locate new attractions at Maryport and at a later stage and dependent on the success of Maryport, at Ravenglass, to link the West Cumbria coast into the 'Greatest Roman Frontier' story and hence support regeneration of the area. It is also recommended that the plans to develop a new museum in Newcastle, to include the Museum of Antiquities collection, be supported by the Major Study. At a later stage, the recommendation is also to consider a Wall reconstruction within the Central Section, as a means of refreshing the visitor offer

#### 9.6 The three supporting components are:

- ❑ Investment in the National Trail and Cycle Paths to support their longer term sustainability, recognising the growth in usage due to the 'Greatest Roman Frontier'
- ❑ Directional signage to facilitate visits to the 'Greatest Roman Frontier' and encourage visitors to explore the sites and simple Orientation Points along the line of the Wall, to help direct walkers and cyclists and inform them of the facilities available along the route of the Wall
- ❑ Information and communications technology (ICT) developments to improve site linkages and external communications. To include the development of the website and systems to facilitate on-line ticketing and joint ticketing across the sites

#### 9.7 The Major Study has also identified quality and quantity issues in the supporting infrastructure for services such as accommodation, retail and catering which, if left unaddressed will constrain the successful implementation of the Major Study recommendations. Whilst the detail of this supporting infrastructure requirement is outside of the scope of the Major Study, the consultant team strongly recommends that the relevant agencies act to address these issues. They recommend that action to address the issues is taken during the next stage of the development plan and that discussions to progress this are held with the relevant agencies.



9.8 A summary of the schedule for development is set out below:

**HADRIAN'S WALL MAJOR STUDY  
SUMMARY OF PROPOSED DEVELOPMENT SCHEDULE**

Phase	Proposed Development Plan Components
Phase I	Install 'Greatest Roman Frontier' Preview Centres
Phase II	New Attraction and Mini Story Centre: Maryport Upgrade: Senhouse Museum, Maryport Main Story Centre and Central Transportation Hub: Haltwhistle Upgrades: Chesters, Housesteads, Roman Army Museum, Vindolanda Improvements to Hadrian's Wall National Trail and Cycle Paths Install Orientation Points: Ravenglass to Newcastle
Phase III	Mini Story Centre: Tullie House Museum, Carlisle Upgrade: Corbridge, Birdoswald, Tullie House Museum, Carlisle
Phase IV	Mini Story Centre: Antiquities Museum, Newcastle Upgrades: Arbeia and Segedunum
Phase V	New attraction: Ravenglass Wall Reconstruction: Central Section

*Source: Consultant Team*

**Initial Capital Cost Estimates of Proposed Development Plan**

- 9.9 Costing the capital requirements before creating more detailed concept designs and identifying target sites is extremely difficult. Therefore, the capital cost estimates provided are initial ones based on industry ranges for typical investment per visitor. These costings need to be analysed further.
- 9.10 Including an allowance to cover the costs of the development programme, which will include evolving the development plan, such as detailed site assessments and the development of the differentiation strategy, the total capital investment, over the whole lifetime of the programme (up to 10 years) is estimated at £56.25 million.

**Impact on Current Initiatives**

- 9.11 The consultant team has reviewed relevant existing development proposals in the area and suggest a number of these for integration into the Major Study development plan. These include plans to develop Housesteads, Chester, Vindolanda, Senhouse Museum, and Tullie House, and improvements and extensions to the National Trail and the Sustrans cycleway.

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## 10. MARKETING AND COMMUNICATIONS STRATEGY

- 10.1 To achieve the benefits of the significant capital development programme needed to deliver the 'Greatest Roman Frontier' and to achieve the objective of the Major Study, to grow tourism revenues to the North of England in a sustainable manner, it will be necessary to:
- ☐ Raise public awareness of the new interpretation and experiences along the Wall, including its little-known existence along the West-Cumbria coast
  - ☐ Convert the awareness into visits to the Wall for whatever type of experience particular tourists enjoy, whether it be an intensive single visit to one particular site, a day visiting several sites, a walk on part of the Trail, or a staying visit which can involve an extended version of any of the above
- 10.2 This will require a marketing strategy and communication plan which, to be effective, would have the following attributes:
- A single focus for the design and execution of the strategy
  - ☐ Significant funding which gives the budget enough power to attract co-operative activity from the stakeholders
  - ☐ An agreement with stakeholders as to the revenue targets that might be achieved, perhaps taken to the point of a service level agreement
- 10.3 The task of the marketing team will be to increase the number of visitors to the Wall from the current level of 776,000 to the projected level of 1,038,000 by 2011. Within this total, visitors to sites are projected to grow from the current level of 458,000, to 665,00 by 2011, with the average number of sites visited per visit growing from the current level of 1.3 per visit, to just over 1.8 by 2011.

## 11. TESTING THE STRATEGY

- 11.1 The final stage of the Major Study was the testing of the strategy to check that it satisfied the requirement to bring economic benefit to the North of England, and that it achieved this in a manner that is **sustainable**, in particular in terms of the environment and its transport impact on the Wall.

### Economic Impact of the Strategy

- 11.2 In order to determine the economic benefit of the strategy an economic impact model has been constructed. A number of assumptions have been recommended by the consultant team as inputs to this model, and agreed with the client. These include:
- The capital costs of the development programme
  - Annual site operating revenues and costs
  - Non-site specific costs, including organisational support structure costs, the Main Story Centre and Transport Hub costs and costs to support the maintenance of the National Trail and Sustrans cycleway
  - Average rates of expenditure per visitor per trip (excluding expenditure at sites)
  - Average turnover per job and average cost per job
  - Forecasts for growth in visit and visitor numbers, as development plan comes on stream, both to the sites and for visitors to the Wall that do not visit sites
- 11.3 The economic impact model shows that these inputs result in an increase of 34 per cent in the number of visitors to Hadrian's Wall, across the two regional development agencies, over the period 2003 to 2011, and in an increase in visitor expenditure of 72 per cent over the same period
- 11.4 This increased expenditure will create a total of 1,622 additional jobs between 2003 and 2011, as a result of the proposed Development Plan. Of these jobs, 73 are on-site at visitor attractions along the Wall, 1,013 are off-site, and 536 are due to the multiplier effect. With a total development cost of £56.25 million, this implies that the investment cost per additional job equates to just over £34,680
- 11.5 The Development Plan would also safeguard 252 jobs that would be lost if visitor numbers to Hadrian's Wall attractions were to decline at historic rates.
- 11.6 Of the total number of additional jobs of 1,622, the model indicates that 174 (10.7 per cent) are created by projects built in the North West region, and 1,448 (89.3 per cent) by projects built in the North East region.
- 11.7 In reality, the share of jobs and other economic benefits is likely to be less unevenly distributed. Whilst the majority of the components proposed for the Central Section are actually located within the North East region, their physical proximity to the Cumbria border will mean that the Eden and Carlisle districts should also benefit from the projected growth in tourism. Taking this into account, the North West share of jobs and economic benefits is more likely to be between 15 and 20 per cent of the total.
- 11.8 The model also indicates a strong economic rate of return. With multiplier effects applied, the economic rate of return for the

Major Study recommended Development Plan, to 2025, is just over 38 per cent in real terms. This compares to a typical hurdle real rate of return for a project of this type of around 15 per cent. As the proposed Hadrian's Wall development plan comfortably exceeds this hurdle rate, the conclusion would be that it would be economically worthwhile to implement the plan.

- 11.9 There is a concern that if no action is taken to improve the Hadrian's Wall visitor experience, then the number of people visiting the area will gradually decline. This is indeed the pattern that has been experienced in the past, without investment in product development. Over the past 30 years the number of visits to three of the main sites in the Central Section of Hadrian's Wall has fallen by an average of approximately 1.65 per cent per annum.
- 11.10 In order to reflect this possible scenario of continued decline, a version of the economic impact model has been created that assumes a 'do nothing' scenario. It has been assumed that doing nothing results in an average 0.8 per cent per annum decline in visitor numbers and expenditure per annum (i.e. a slightly slower decline than has been experienced to date). When compared to this scenario, the economic rate of return for the Major Study recommended Development Plan, with multiplier effects applied, rises to just over 45 per cent in real terms.

### Strategic Environmental Assessment (SEA)

- 11.11 The SEA process has sought to ensure that the broad aims and objectives of the Major Study can be implemented in a sustainable manner that minimises adverse effects on the environment of the area, both natural and cultural, whilst, wherever possible, delivering environmental benefits.

### Current Issues

- 11.12 As part of the assessment process the SEA identified a number of key current and potential issues that are currently affecting the environment and heritage resource of the Hadrian's Wall WHS. These include:
- Growing levels of traffic on the Military Road
  - The need for further car parking at key sites to accommodate future visitors
  - Erosion related impacts at sites and at pinch points along the National Trail
  - Possible impacts on the landscape and ecological resource stemming from climate change
  - Impact of land management regimes on archaeological sites (both positive and negative)
  - Impact of new and existing developments on the setting of the WHS

### Recommendations of the SEA

- 11.13 Due to the environmental sensitivity of the WHS and associated areas, the predicted growth in visitor numbers due to the Major Study and the proposed developments within the Major Study pose a number of environmental issues. However, the proposals have the potential to address a number of current and emerging environmental issues and could deliver environmental benefits for some areas of the Study areas.
- 11.14 To achieve the proposed growth in visitor numbers and implement the proposed development without significant environmental impacts will require a robust project planning and implementation process led by an integrated management regime with agreed environmental monitoring procedures and indicators. Without such measures the proposals may have significant adverse environmental impacts including impacts on the significance, character and fabric of the WHS and other highly sensitive environmental assets in the wider area. A robust implementation strategy will also ensure that environmental benefits are realised at every opportunity.

## **Transport Assessment**

- 11.15 The transport assessment has reviewed the ability of the Major Study development plan to achieve increased visitor revenues in a sustainable manner, relating to transport concerns, and has considered the proposed sustainable transport initiatives to determine whether they might help this to be achieved.

## **Current Issues**

- 11.16 On the whole Hadrian's Wall is reasonably well served by sustainable transport modes, including bus, rail and access for walkers and cyclists. The strategic and local road network around the Wall is generally operating within theoretical capacities.
- 11.17 An assessment of the existing signing for Hadrian's Wall has identified inherent problems in both the quality and quantity of signage for the various attractions including those in the west. This is a particular issue in the Central Section.
- 11.18 It is clear that there is at present no formal structure or hierarchy to the signage regime. This is exacerbated by the various local and national government bodies responsible for different sections of local and trunk road network. As a result traffic signing has been developed in a piecemeal fashion over the years, as development of the Hadrian's Wall sites has taken place. The general quality of the signs is lower than should be expected in one of Britain's premier tourist attraction destinations, a situation which needs to be addressed in order to achieve the Vision for the Wall.

## **Recommendations of the Transport Assessment**

- 11.19 The transport assessment recommends that the following proposals set out in the Major Study should be developed further:
- ❖ Signing and route hierarchy. A detailed signing strategy, based on route hierarchy to be agreed, is required to minimise the environmental impacts of traffic and to maximise linked trips along Hadrian's Wall.
  - ❖ Cycling and walking. The development of a walking and cycling signing strategy is required. This would link into the proposals for Orientation Points along the route of the Wall.
  - ❖ Main Story Centre and Transport Hub. Detailed consideration of the exact location for the Central Section transport hub is required, together with a detailed review of the bus service to be provided.

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## 12. RECOMMENDED NEXT STEPS POST THE MAJOR STUDY

- 12.1 The findings of the Major Study indicate that significant improvements in the organisational support structures for Hadrian's Wall is required if it is to achieve the desired step change in its contribution towards tourism revenues in the North of England.
- 12.2 In order to progress the recommendations and proposals set out by the Major Study, the first task will be to initiate these major improvements, in consultation and discussion with the organisational support structures, to create the capability required to deliver the agreed Vision.
- 12.3 This will involve gaining buy-in from key stakeholders to these improvements, and to the wider Major Study recommendations. It will also involve the commitment of key personnel, to manage key tasks such as the implementation of the development plans and the development of the marketing and communications strategy.
- 12.4 Other key priorities are as follows:
- 1 The creation of a detailed development and funding plan and concept design for the 'Greatest Roman Frontier' and detailed development plans for each site. Analysis of the study estimates and prioritisation of the individual elements that make up the plan should take place at this stage.
  - 2 The creation of a panel, consisting of Hadrian's Wall historians, site curators and archaeologists, as well as attraction designers and interpretation experts, responsible for developing the content details for each site within the context of the Wall-wide interpretation, content and differentiation strategy.
  - 3 The progression of development plans affected by other grant giving bodies' deadlines, such as the ERDF bid components (ensuring that these are consistent with the overall content and differentiation strategy).
  - 4 The development of the brand, the 'Greatest Roman Frontier'.
- 12.5 Once specific developments for each site have been determined, there will also be a requirement to conduct a full environmental impact study and more detailed transport assessment, and to finalise the capital and revenue budgets for each site.



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## 13. SUGGESTED TARGETS AND MEASURES

- 13.1 The agreement of targets and measures to monitor those targets will be important in assessing the success of the implementation of the Major Study recommendations. Careful monitoring of performance over time against these projections will support key future decisions, for example, whether or not to implement Phase V of the development plan.
- 13.2 The Economic Impact Model contains estimates for current performance and projections for future performance. These projections should form the targets for the development plan to be measured against.
- 13.3 The current model contains general assumptions across sites. Once site specific feasibility assessments have been conducted, more detailed information will become available, which should be used to update the Economic Impact Model, and hence the targets.
- 13.4 In order to monitor current performance, the consultant team recommend conducting regular visitor audits for Hadrian's Wall, building on the visitor audit conducted in 2003. Actual attendance at the sites along the Wall, and counts from the Hadrian's Wall National Trail will also be helpful in monitoring performance.







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