

**HADRIAN'S WALL  
MAJOR STUDY  
REPORT**

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## **1. EXECUTIVE SUMMARY**

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### ***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 The following section provides an executive summary of the findings of the Major Study. The full findings are set out in detail in the following sections of this report and in the accompanying appendices.

### ***THE MAJOR STUDY PROCESS***

- 1.4 The consultant team has been 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. In addition, a framework for the Major Study has been provided by the second Hadrian's Wall Management Plan.
- 1.5 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.

### ***CURRENT STATUS OF HADRIAN'S WALL***

#### ***Introduction***

- 1.6 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.
- 1.7 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. Site visits were also made by the consultant team to the museums and heritage sites along the Wall.

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### ***Lessons from Consumers***

- 1.8 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.
- 1.9 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.
- 1.10 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 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.
- 1.11 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***

- 1.12 The stakeholders have a strong belief in the potential of the Wall, but recognise that changes are required not only to the product but also to the supporting infrastructure in order to realise this potential.
- 1.13 The need to persuade local businesses and communities of the benefits that tourism can bring was felt to be key to achieving this change. 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.
- 1.14 The stakeholders also expressed concerns about the current organisational set-up. The current partnerships were seen to be too large and unwieldy, due to their requirement to represent the interests of all the partners involved. As a result there was seen to be a lack of leadership, with no clear authority given to any one organisation. The nature of the partnerships' funding was also seen to require the partnerships to work to the agendas of the funding sources, which were not always seen to be consistent with the interests of the Wall.
- 1.15 A further area of concern 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, senior representatives of many of the organisations reported that the new treatment was a backward step that was inappropriate for moving the Wall forward.

### ***Current Visitor Volumes***

- 1.16 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***

- 1.17 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.
- 1.18 In total 4.3 million people reside within 80 miles drive of the length of Hadrian's Wall. Of these, 2.4 million live within 40 miles drive and 1.9 million live within 40 to 80 miles drive. Both populations are relatively low compared to other locations within the UK, reflecting the need for the Major Study to attract new visitors into the region in order to avoid substitution from existing visitor offers.
- 1.19 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.

## ***LESSONS FROM COMPARABLE DEVELOPMENTS***

### ***Introduction***

- 1.20 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***

- 1.21 The research identified a number of locations that had faced similar challenges to Hadrian's Wall in their need to get disparate parties to work together. The locations that were most successful at managing this were those where there was a formal central organisational structure with devolved powers.
- 1.22 A number of the 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.

- 1.23 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 scale of the individual sites included some very small sites, not able to afford to effectively market themselves.

## ***THE VISION***

### ***Introduction***

- 1.24 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.
- 1.25 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 client and selected representatives from key stakeholder organisations.
- 1.26 The draft Vision was then tested with a wider stakeholder audience, through a series of workshops. In addition to testing the draft Vision, 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.
- 1.27 Crucially, the Vision was also tested amongst consumers at selected locations in England and Scotland, through group discussions. The discussions focused 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***

- 1.28 The findings of the testing of the Vision and the consultants' recommendations for the Vision were presented to and agreed by the October Steering Group meeting and are set out below.

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

### ***Implications of Vision***

- 1.29 The Vision is ambitious and presents a challenge that the current organisational structure is unlikely to be able to meet. There is therefore a requirement for a new organisation, suitably constructed to meet the challenge, capable of directing substantial capital investment budgets and managing the future direction of the Wall. The Major Study's recommendations for such a new organisation are set out below, in Organisational Strategy.
- 1.30 In order to achieve the Vision, there is a need to create a cohesive visitor experience that can deliver the 'Greatest Roman Frontier' positioning, and 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.
- 1.31 Firstly, 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.
- 1.32 Secondly, 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'.
- 1.33 Recommendations for developing the visitor experience are set out in the recommended development plan. There is also a need to develop 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 of the Major Study, the Study does recommend that attention is paid to supporting visitor infrastructure alongside the implementation of the proposed development plan.

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## ***STRATEGIC OBJECTIVES***

- 1.34 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. The aim is to achieve this within the framework of the second Hadrian's Wall Management Plan.
- 1.35 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).
- 1.36 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.
- 1.37 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 focused 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.
- 1.38 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.
- 1.39 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.

## ***ORGANISATIONAL STRATEGY***

- 1.40 The primary role of any new organisation for Hadrian's Wall is to become the responsible body for delivering the Vision. The new Vision is by definition all encompassing, therefore the new organisation needs to be capable of addressing all activities that concern the delivery of this Vision.

- 1.41 In order to ensure a high quality experience such an organisation 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.
  - The future product development along the whole of the Wall, including developing, implementing and co-ordinating the interpretation and education strategy, and improving the visitor experience.
  - Its marketing locally, regionally, nationally and internationally.
  - The proper management of its visitors on the ground.
- 1.42 Thus there needs to be few restrictions on its capacity to intervene on behalf of the Wall as a whole and the agreed Vision for it. It needs to be a heritage tourism organisation with real national clout.

### ***Recommended New Organisation Structure***

- 1.43 The consultant teams' view is that a new not-for-profit company with charitable status would be the most appropriate to fulfil the role of the new organisation for the whole Wall. In the future, this new organisation might need to evolve into a statutory body with additional legal powers as required.
- 1.44 It is suggested that this new organisation might simply be called the Hadrian's Wall Trust (HWT). As a company limited by guarantee (ie a not-for-profit-company) with intended charitable status, HWT could be formed by a membership of interested parties. The main duty of the members of HWT would be to elect a suitable and effective HWT Board of Directors to be responsible for the running of the company on a day-to-day basis.
- 1.45 Over time, the role of the members of HWT will be to ensure that the Board of Directors remains effective in meeting the objectives defined in HWT's Memorandum of Association.
- 1.46 The membership of HWT should be limited to the main 'power brokers' of the project, in terms of their potential funding role, their heritage, conservation and tourism credentials, and in terms of representing the key political interests along the Wall.
- 1.47 The charitable objects of HWT would be likely to involve two strands:
- The preservation of sites, buildings, structures, remains and artefacts of national interest or architectural or historic interest or historically associated with Hadrian's Wall in the North of England and the protection, augmentation and enhancement of the amenities of such sites, buildings, structures, remains and artefacts and their surroundings for the public benefit.
  - Access to and enjoyment by the public of Hadrian's Wall, the 'Greatest Roman Frontier', for the purposes of education into British Roman history

and other matters related to the history of the Wall since its original construction.

- 1.48 The key role of The HWT will be a conservation/developmental one, but as indicated above there are major operational and marketing issues that will need to be addressed centrally. This can be done in one of two ways, either by setting up a private trading company or by setting up a not-for-profit company. In either case the role of the company would be to take responsibility for the central operation and trading functions of the Hadrian's Wall visitor experience.

### ***Resources and Funding***

- 1.49 The initial role of the HWT is likely to be a developmental one. Therefore its own initial costs could be covered through the funding of the capital development process in its role acting as the developer of the 'Greatest Roman Frontier'.
- 1.50 This capital development programme 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).
  - English Heritage.
  - National Trust.
  - Regional Single Programme monies through the local strategic partnerships.
  - RDA Central Funds.
  - Local Authorities.
  - Charitable donations.
  - Commercial sponsorship.
- 1.51 Given the nature of Hadrian's Wall, the majority of future capital funding will need to come from the public sector. As a not-for-profit charitable company acting in the public good, the HWT should not have such funding restricted by State Aid Rules and therefore could accept 100 percent public funding if this was available. In such a situation ERDF would be expected to contribute at least 25 percent (for any programme up to 2006 only) and maybe more, if available.
- 1.52 The HWT could earn an on-going revenue income from the new developments it has created via the company set up by the HWT to operate and trade on behalf of the trust, or other operators. This operating and trading body could also earn an income from the delivery of any centralised services provided either direct to visitors or indirectly on behalf of other site operators by contract - such as marketing and ticketing, education, events management, staff training etc. However, it is likely that an on-going operating subsidy will be required, to cover the provision of these services and the costs of conservation, heritage and environmental management.
- 1.53 As a national monument in a unique mainly rural/coastal setting the Wall will probably eventually need to rely on national funding via English Heritage, the Countryside Agency and others – as at present.

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## ***INTERPRETATION AND PRODUCT DEVELOPMENT STRATEGY***

### ***Strategic Requirements***

- 1.54 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.
- 1.55 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.
- 1.56 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.
  - Deliver a more complete big picture perspective on Hadrian's Wall through improved linkages between 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***

- 1.57 To augment existing structures and assist in managing the flow of the visitor experience, we recommend that several components be added to the current visitor experience. We 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. We also propose three supporting components that would assist with logistical issues and communications.

1.58 The main 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.
- 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, are 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.

1.59 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.

- 1.60 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. It is recommended 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.

### ***Summary of Schedule for Development***

- 1.61 A summary of the schedule for development is set out in Figure 1.1.

<b>FIGURE 1.1 HADRIAN'S WALL MAJOR STUDY SUMMARY OF DEVELOPMENT SHCHEDULE</b>	
<b>Phase</b>	<b>Development Plan Components</b>
Phase I	Install 'Greatest Roman Frontier' Preview Centres.
Phase II	New Attraction and Mini Story Centre: Maryport. Upgrade at 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 Development Plan***

- 1.62 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 top line estimates, and are based on industry ranges for typical investment per visitor.

- 1.63 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 recommended capital investment is estimated at £56.25 million.

### ***Impact on Current Initiatives***

- 1.64 The consultant team has reviewed relevant existing initiatives proposed for development projects in the area. A number of these have been proposed for integration into the Major Study development plan. These include plans to develop Housesteads, Chesters, Vindolanda, Senhouse Museum, and Tullie House, and improvements and extensions to the National Trail and the Sustrans cycleway.

## ***MARKETING AND COMMUNICATIONS STRATEGY***

- 1.65 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.
- 1.66 This will require a marketing strategy and communication plan which, to be effective, would have the following attributes:
- A single decision making body which designs and executes the strategy.
  - Central funding which gives the budget enough clout 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.
- 1.67 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 665,000 by 2011, with the average number of sites visited per visit growing from the current level of 1.3 sites per visit, to just over 1.8 sites per visit by 2011.
- 1.68 A revenue budget of £1.5 million per annum has been assumed to fund this marketing activity, part of which would be joint-funded by partners and advertising revenues. Further capital funds have been assumed for the pre-launch period to support brand building work and initial marketing costs such as origination and content development.

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## ***TESTING THE STRATEGY***

1.69 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***

1.70 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 central organisation costs, the 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.

1.71 The economic impact model shows that these inputs result in an increase of 34 percent 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 percent over the same period.

1.72 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.

1.73 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.

1.74 Of the total number of additional jobs of 1,622, the model indicates that 174 (10.7 percent) are created by projects built in the North West region, and 1,448 (89.3 percent) by projects build in the North East region.

1.75 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 percent of the total.

- 1.76 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 percent in real terms. This compares to a typical hurdle real rate of return for a project of this type of around 15 percent. 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.
- 1.77 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 percent per annum.
- 1.78 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 percent per annum decline in visitor numbers and expenditure per annum (ie a slightly slower decline than has been experienced to date). By comparison to this scenario, the economic rate of return for the Major Study recommended Development Plan, with multiplier effects applied, rises to just over 45 percent in real terms.

### ***Strategic Environmental Assessment (SEA)***

- 1.79 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**

- 1.80 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 included:
- 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.

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### **Recommendations of the SEA**

- 1.81 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 Area.
- 1.82 To achieve the proposed growth in visitor numbers and implement the proposed development without significant environmental impacts it will be necessary to implement 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***

- 1.83 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 enable this to be achieved.

### **Current Issues**

- 1.84 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.
- 1.85 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. This includes those in the west but is especially an issue in the Central Section.
- 1.86 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 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**

- 1.87 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.
- 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.

### ***RECOMMENDED NEXT STEPS POST THE MAJOR STUDY***

- 1.88 The findings of the Major Study indicate that a change in the organisational structure of the Wall is required if Hadrian's Wall is to achieve the desired step change in its contribution towards tourism revenues in the North of England.
- 1.89 Hence, in order to progress the recommendations and proposals set out by the Major Study, the first task will be to initiate the formation of a new central organisation that is capable of delivering the agreed Vision.
- 1.90 This will involve gaining buy-in from key stakeholders both to the structure and the remit of the new central organisation, and to the wider Major Study recommendations. It will also involve the recruitment of key personnel, to manage key tasks such as the implementation of the development plans and the development of the marketing and communications strategy.
- 1.91 Other key priorities are as follows:
- The development of an outline physical master plan and concept design for the 'Greatest Roman Frontier' and detailed development plans for each site.
  - 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 and content strategy.
  - 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).
  - The establishment of a funding plan.
  - The development of the brand, the 'Greatest Roman Frontier'.
- 1.92 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.

### ***SUGGESTED TARGETS AND MEASURES***

- 1.93 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.

- 1.94 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.
- 1.95 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.
- 1.96 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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## **2. INTRODUCTION**

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- 2.1 Hadrian's Wall was built in AD122 on the orders of the Emperor Hadrian, to mark the Northern frontier of the Roman Empire. In 1987 it was designated as a World Heritage Site (WHS) by the UNESCO World Heritage Committee as a site of outstanding universal value.
- 2.2 Whilst recognised by academics as being the best surviving example of a Roman frontier system in concept, design and achievement, Hadrian's Wall is not considered to play a strong role in contributing towards tourism revenues in the North of England. The line of the Wall runs through the areas covered by the North West Regional Development Agency and the ONE Northeast Development Agency. The two Regional Development Agencies (RDAs) have joined together with the objective of raising the profile of Hadrian's Wall and hence addressing the issue of contribution.
- 2.3 Economics Research Associates (ERA) was commissioned by the two RDAs in April 2003, to lead a team of consultants in undertaking a year long Major Study into Hadrian's Wall. The objective of the Major Study is 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 inspires, challenges and delivers a step change in the contribution made by the Wall to the economies of the North of England.
- 2.4 The Government recommends that all WHSs in England should prepare a Management Plan, as a means of dealing with all the issues affecting these generally complex sites. The Management Plan is intended to provide the means for establishing an appropriate balance between the needs of conservation, access, sustainable economic development, and those of the local community. The current Hadrian's Wall Management Plan (2002 to 2007) provides a critical framework for the direction of the Major Study.
- 2.5 This report provides an overview of the findings of the Major Study and sets out the agreed Vision for Hadrian's Wall, the recommended strategy for realising the Vision and an outline plan for the implementation of the strategy.
- 2.6 The report has been prepared under the guidance of David Camp, Director of ERA, by Lesley Morisetti, Associate Director of ERA; Siân Johnson, Siân Johnson Associates; Marc Mallam, Mallam and Company; Andrew Croft, Chris Blandford Associates; Andrew Stothert, Brand Vista; Donna Davidson, BRC Imagination Arts; Steve Mills, MEW Research; Duncan Birrell, Colin Buchanan Associates; and Mike Nevin, Caledonian Economics. Research and assistance was provided by James Kennard, Gail Crocker and Polly Brown of ERA and by staff members of the various consultancy organisations.

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## **3. PROCESS**

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### ***THE CLIENT AND STEERING GROUP***

- 3.1 The Major Study process has been directed by the clients, ONE NorthEast Development Agency and the North West Development Agency, and supported by the Major Study Steering Group.
- 3.2 In addition to providing the funding for the Major Study and managing the budget, the clients have provided project management resource to ensure that the study remains on brief and to schedule.
- 3.3 The Major Study Steering Group was made up of representatives from the following organisations:
- ONE NorthEast (John Sargent and the project manager Anita Thornberry /Peter Stone).
  - North West Development Agency (Phil Reddy).
  - Hadrian's Wall Tourism Partnership (HWTP).
  - Northumbria Strategic Partnership (NSP).
  - English Heritage (Representatives from Head Office & NW and NE Regions).
  - Northumbria Tourist Board (NTB).
  - Cumbria Tourist Board (CTB).
  - Cumbria County Council (CCC).
- 3.4 The role of the Steering Group members was to represent their organisations on the Major Study, feedback to their organisations on the progress of the study and voice their organisations' requirements and issues at Steering Group meetings. The Steering Group members also played a key role in facilitating the Major Study and advising the consultants on its progress.

### ***MAJOR STUDY PROCESS***

- 3.5 The Major Study consisted of five key stages. These stages, together with key tasks undertaken at each stage, are set out in Figure 3.1. The findings from each of the key stages are set out in the following sections.

**FIGURE 3.1  
HADRIAN'S WALL MAJOR STUDY  
KEY STAGES AND KEY TASKS**

Key Stage	Timing	Key Tasks
Fact Finding	Apr-Jun 2003	Review of key sites Consultation with Stakeholders Primary consumer research Market assessment Review of comparable developments Identification of key issues
Visioning	Jul-Sept 2003	Preparation of briefing papers Visioning programme Stakeholder Visioning workshops Primary consumer research Consultant team Vision workshop Recommended Vision
Development of Strategy	Oct-Dec 2003	Consultant team brainstorm Formulation of strategy Formulation of development plan Phasing & cost assessment Feedback from Stakeholders Recommended strategy
Testing of Strategy	Jan-Feb 2004	Economic impact assessment Environmental impact assessment Transport impact assessment Review with clients & Steering Group
Reporting	Apr 2003 - Mar 2004	Presentations to clients & Steering Group Full report covering all stages

*Source: Consultant Team*

### ***MAJOR STUDY PROGRESS REVIEWS***

3.6 The progress of the Major Study was managed through a series of client and Steering Group meetings. Following the initial commissioning meeting in April 2003, client and Steering Group meetings were held in May, July, October and December 2003 and February 2004. Figure 3.2 sets out the key issues discussed at each of the meetings and decisions taken at the meetings.

**FIGURE 3.2  
HADRIAN'S WALL MAJOR STUDY  
CLIENT & STEERING GROUP MEETINGS**

Date of Meeting	Key Issues & Decisions
April 2003	Commissioning meeting (client only)
May 2003	Initial feedback on fact finding stage
July 2003	De-brief on consumer research De-brief on Visioning programme Agreement on draft Vision & Vision testing process
October 2003	De-brief on consumer research De-brief on testing of draft Vision Presentation of recommended Vision Agreement on Vision Initial presentation of strategy
December 2003	De-brief on consumer research De-brief on strategy & development plan Agreement on draft strategy (subject to stakeholder feedback)
February 2004	De-brief on feedback on draft strategy Agreement on strategy (subject to testing) Presentation of Economic Impact Assessment Presentation of Environmental Assessment Presentation of Transport Assessment
March 2004	Agreement on Economic Impact Assessment inputs (client only)

*Source: Consultant Team*

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## 4. CURRENT STATUS OF HADRIAN'S WALL

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### *INTRODUCTION*

- 4.1 The first stage of the Major Study was focused on reviewing the current status of Hadrian's Wall, in order to determine the key issues and the potential opportunities.
- 4.2 During the fact finding stage the consultant team conducted the following research programme. Interviews were held with representatives from the two commissioning RDAs and around 50 representatives from key stakeholder organisations involved in the management and running of Hadrian's Wall. A full list of interviewees and a summary of their comments is given in Appendix 1.
- 4.3 In addition, the current visitor offer was reviewed through site visits to the main sites and attractions, and by eliciting the views of both current and potential visitors through primary consumer market research. The findings of the primary consumer research programmes are set out in Appendix 2.
- 4.4 The main findings of this research programme are set out below. More detailed findings are contained within the Appendices.

### *THE CURRENT HADRIAN'S WALL OFFER*

#### *Description*

- 4.5 Hadrian's Wall was inscribed as a World Heritage Site (WHS) in 1987 as the most complex and best preserved of the frontiers of the Roman Empire. Its definition is set out in detail in the Hadrian's Wall Management Plan (2002 to 2007). The site crosses England from the area of Newcastle upon Tyne, through the centre of Carlisle, and extends south west along the Cumbria coast. The WHS encompasses the remains of Hadrian's Wall and its associated structures between Wallsend and Bowness-on-Solway, the fort at South Shields (Arbeia) at the mouth of the Tyne, the Stanegate forts south of the Wall, the outpost fort at Bewcastle and the defences on the Cumbria coast as far as Ravenglass.
- 4.6 The form and location of Hadrian's Wall is conditioned to a large extent by the geology and topography of the country through which it passes. Its general location was determined by the presence of the Tyne Solway isthmus and its detailed route shows that its line was carefully selected to meet the needs of its builders. The Wall passes through a number of very different terrains along its length including coastal, urban and rural settings.
- 4.7 The Hadrian's Wall Management Plan segments the WHS into four main sections. To the East is urban Tyneside, which contains the visitor sites of Arbeia and Segedunum together with the urban sections of the National Trail. In much of this area the archaeological remains of the WHS have been dislocated from their landscape setting. The middle section, commonly called the Central Section,

stretches from Heddon-on-the-Wall to Brampton. This section contains some of the best known visitor sites, starting with Corbridge in the East and ending with Birdoswald in the West. West of Brampton the Wall runs through the Solway Basin, an AONB area, where little remains to connect the section to the Wall. The final section is the West Cumbria Coastal Plain, which stretches from Maryport down to Ravenglass, and at present features a number of current and potential Roman excavations.

- 4.8 For the purposes of the Major Study the last two sections have been combined into a West Cumbria section, which includes Tullie House in Carlisle and stretches down to Ravenglass on the coast. It is also important to be aware that the site at Birdoswald sits within the county of Cumbria. Hence, although it is considered as part of the Central Section visitor experience, in terms of economic benefit, its impact has to be assessed within that of Cumbria as a whole.
- 4.9 Today, visitors to the Wall find fragments of the Wall remaining, together with a series of excavated sites and museums relating to the Wall and its fortifications. The majority of the visitor experience is focused on the Central Section of the Wall, between Birdoswald and Corbridge. In May 2003, the launch of the National Trail had some impact on broadening this focus by providing a connection from the west coast to the east coast. With the exception of the Senhouse Museum, there is currently very little activity along the West Cumbria coast aimed at linking the area to the Hadrian's Wall story.

## ***The Visitor Experience***

### **Introduction**

- 4.10 The current visitor experience has been assessed through a review of the key sites conducted by the consultants, interviews with key stakeholders, and market research conducted by MEW Research.
- 4.11 As set out below, the views of consumers, stakeholders and the consultant team are largely consistent and highlight concerns about the quality, differentiation and communication of the current visitor experience.

### **Consumer Research**

- 4.12 The 2003 Visitor Audit, conducted by MEW Research, included questions relating to how the Hadrian's Wall experience matched visitors' expectations of their visit. Further information on perceptions of the visitor experience was provided by market research conducted by MEW Research amongst potential visitors, ie people visiting the region (Alnwick Castle, Carlisle, Durham and Keswick) but not actually visiting Hadrian's Wall. The full findings of these research studies are set out in Appendix 2. A summary of the key findings is given below.
- 4.13 The research identified a range of differing expectations for a visit to Hadrian's Wall. For those that lived locally their knowledge of Hadrian's Wall was largely based on school trips, with the belief that little was likely to have changed since they were at school. For previous visitors, the Wall consists of a collection of Roman sites with little to unify them into a cohesive visitor experience. For non-

visitors the perception is that it is just a wall, with a lack of any specific awareness of what there is to see and do. Because of this lack of knowledge a trip to Hadrian's Wall is felt to be too risky to commit precious leisure time to.

- 4.14 Respondents felt that they should visit Hadrian's Wall, for educational or health and fitness reasons, making it a duty visit rather than one for enjoyment per se. A key motivator for leisure visits in general is normally recommendations from friends and relatives. However, few respondents stated that a recommendation had influenced their trip to Hadrian's Wall, indicating that it currently lacks a 'wow' factor.
- 4.15 In general, visitors arrive with relatively modest expectations, with the view that a visit to Hadrian's Wall is very much 'what you make of it yourself'. The actual experience is fairly positive, with three quarters of first time visitors rating it better than expected. The most popular aspects were the sites where a good balance had been achieved between authenticity/preservation and bringing the site to life. Segedunum was felt by a number of respondents to be a good example of this. Physical completeness, such as is presented at Arbeia, was also well received, although Arbeia was also perceived to lack a 'sense of place' due to its urban location, off the route of the Wall.
- 4.16 Interpretation at the sites was generally seen to be not particularly good. This was the case for interpretation of the site itself and also for linking each site with the other sites along the Wall and with the Wall itself.
- 4.17 The lack of a focal point at which to access the Wall was given as being a key barrier for attracting new visitors, together with the fear that the large number of signs stating (different) directions to Hadrian's Wall meant that no single location would have sufficient to make a visit worthwhile.

### **Stakeholder Feedback**

- 4.18 Stakeholders were asked during their consultations, what they thought of the current visitor experience and what they thought might be required to change in order to improve the experience.
- 4.19 The majority of respondents believed in the Wall's potential to be a key driver of tourism to the regions, especially the North East. The potential of Hadrian's Wall in the North West was felt to be significantly under-realised.
- 4.20 However, the Hadrian's Wall product was generally felt to be under-utilised, with its status as a tourism destination largely unrecognised outside of the region. As a result, whilst it was recognised that visitation to the Wall needs careful management, the environment was not felt to be at risk with the current level of visitation. However, the potential physical impact of high numbers of walkers on the National Trail was highlighted as a possible cause for concern by some stakeholders (nb this stage of consultancy took place before erosion concerns led to the stopping of the National Trail passport in October 2003).
- 4.21 Perceptions of the Wall were felt to be led by the Central Section, with Arbeia and Segedunum, for example, seen to be too urban to be part of Hadrian's Wall.

However many interviewees felt that these new urban sites offered a unique and engaging experience and offered many lessons for other more traditional attractions along the wall.

- 4.22 The style of interpretation at the attractions alongside Hadrian's Wall was generally felt to be old fashioned and inconsistent in quality, although Segedunum was mentioned as having a better, more up-to-date style of presentation. The sites were also seen to be primarily archaeologically based, with little attempt to cover the social history of the wall, or to convey the true role of the Wall and how it worked in Roman times, or indeed to expand the story beyond Roman times.
- 4.23 Some respondents expressed a need to expand the attraction offer and were concerned that the current offer lacked sufficient substance to be effectively marketed. It was seen as important that improvements and/or new developments should be of a standard that they would shift perceptions about Hadrian's Wall.
- 4.24 There were concerns from others about the product's appropriateness to both the family market (for whom it is seen as stuffy and unexciting) and for the international tourist market looking for a day visit out of Newcastle (for whom it is seen as "childish and lacking in sophistication").
- 4.25 Greater linkage between the sites was felt to be important, together with the establishment of a sense of arrival and some form of gateway to the Wall, through which to disperse visitors along the Wall. The location of future orientation centres was felt to be important, with Haltwhistle and Once Brewed both mentioned as potential sites.
- 4.26 Some interviewees suggested creating a hierarchy of attractions, with visitors directed initially to the main, most inspiring attractions, and then encouraged to visit the smaller attractions from there. There was concern that all attractions are currently given equal prominence (for example in print material), hence overwhelming visitors with choice, and not ensuring good impressions by initially attracting them to what was seen as the best.
- 4.27 The wall is seen (or perceived) to be very fragmented, no longer a continuous wall. A high proportion of respondents were in favour of reconstructing some sections of the wall in order to help encourage visitors.

## **Consultants Review**

### Overview

- 4.28 Hadrian's Wall has several distinguishing elements that make for a world-class visitor attraction:
- It is uniquely positioned as the best surviving and most extensive Roman Empire frontier in the world, and has been duly declared a World Heritage Site (WHS).

- It is a technological triumph engineered and built nearly 2000 years ago. Visitors can see original remains from the Wall, forts, baths, and civilian settlements of this vast former Roman Military Zone.
  - It has well established and award winning visitor sites.
  - It has an outstanding collection of artefacts.
  - Its on-going archaeological excavations have produced some of the most important Roman artefacts ever discovered - such as the Vindolanda Roman Tablets, voted one of The British Museum's top 10 treasures.
  - It contains a wealth of stories waiting to be told, and every day new research reveals more stories about this Wall and the lives of the people who were associated with it.
  - The surrounding area boasts some of the most stunning landscapes in the UK and offers visitors enjoyable recreational activities, such as the Hadrian's Wall Path and cycle route.
- 4.29 Whilst these elements are all compelling and important, they have not been sufficient to attract the level of visitation that Hadrian's Wall deserves. Hadrian's Wall is a national gem. It is a place that should inspire visitors to learn more about England's rich heritage, and to understand the importance of preserving this heritage for the enjoyment of future generations.

#### Site Assessment

- 4.30 Each of the main Roman sites connected to Hadrian's Wall was reviewed by exhibition designers, BRC Imagination Arts. The review included an assessment of how well the sites connected to each other, the quality of their presentation and the quality of the facilities at the site. Whilst the review identified a number of areas requiring improvement in terms of presentation and quality, it also identified many unique features at the sites, representing an excellent opportunity for the future.
- 4.31 The main findings of the review are set out in Figures 4.1 and 4.2

**FIGURE 4.1  
HADRIAN'S WALL MAIN VISITOR ATTRACTIONS**

MAIN SITES	Description	Location	County	Ownership / Management	Admission	Cross Ticketing	Visitor Profile & how it appeals to target market	Extent to which it links to HW	Links to other HW sites	Links to other Attractions
Arbeia Roman Fort & Museum	The Arbeia fort remains represent the most extensively excavated example of a military supply base anywhere in the Roman Empire. Excellent reconstructions of the West Gate, barracks and part of a Commander's House.	South Shields	Tyne & Wear	Tyne & Wear Museums	Free, Separate fee for Time Quest Exhibit Hands-on activities £1.50 Adults, 80p Child /Concessions		Locals and visiting friends & families. Appeals to families, school groups & people interested in seeing the reconstructed West Gate, barracks & Commanders House.	Very well	Strong link to Segedunum.	Limited
Museum of Antiquities	Main archaeological museum of the North East and main museum for Hadrian's Wall. With material from all the forts along the frontier, including the outpost and hinterland forts. Contains a reconstruction of a Mithraeum from Borcolitia.	University of Newcastle upon Tyne	Tyne & Wear	University of Newcastle	Free		Locals and visitors to area. Seems to appeal to older generation and individuals interested in artefacts.	Very well. Only HW museum to hold artefacts from every site along HW	Limited	No

**FIGURE 4.1 CONTINUED**

MAIN SITES	Description	Location	County	Ownership / Management	Admission	Cross Ticketing	Visitor Profile & how it appeals to target market	Extent to which it links to HW	Links to other HW sites	Links to other Attractions
Corbridge Roman Site and Museum	A crucially positioned garrison town that later became a civilian village. Museum contains finds and remarkable sculptures.	Corbridge	NH	English Heritage	£3.10 adults, £2.30 concessions, £1.60 child		Tourists to area. Appeals to all ages.	Very well.	Limited	Limited
Chesters Roman Fort and Museum	Best visible remains of a Roman Cavalry Fort in Britain. With military bath house surviving as one of the best preserved buildings along the line of Hadrian's Wall. Edwardian Museum houses the Clayton collection with an extensive array of finds.	Hexham	NH	English Heritage	£3.10 adults, £2.30 concessions, £1.60 child		Tourists to area. Families. Appeals to all ages.	Very well	Limited. Does not mention the recreated Chester bath house at Segedunum.	Limited
Housesteads Roman Fort	Best preserved Roman fort in Britain. Spectacular position with commanding views and good stretches of Hadrian's Wall.	Haydon Bridge	NH	Owned by National Trust & Operated by English Heritage	£3.10 adults, £2.30 Concessions, £1.60 child, £7.80 Family, Free NT Members, Free EH Members		Tourists to the area. Appeals to all ages.	Very well. Site is positioned on the Wall	Limited	Limited

**FIGURE 4.1 CONTINUED**

MAIN SITES	Description	Location	County	Ownership / Management	Admission	Cross Ticketing	Visitor Profile & how it appeals to target market	Extent to which it links to HW	Links to other HW sites	Links to other Attract-ions
Vindolanda Fort and Chesterholm Museum	Roman fort and town with excavation in progress. Museum displays rare Roman finds about everyday Roman life, gardens with re-constructed Roman Temple, shop and house.	Bardon Mill	NH	Vindolanda Trust	£4.10 adults, £3.50 concessions, £2.90 child, 10% discount EH members	Combined ticket with The Roman Army Museum £6.00	Tourists to area. Appeals to families with older children.	Very well.	Strong links to Roman Army Museum	Limited
The Roman Army Museum	Museum illustrating Insight into daily lives of Roman Soldiers. Reconstructions, audio commentaries and films complement displays of Roman objects.	Bramp-ton	NH	Vindolanda Trust	£4.10 adults, £3.50 concessions, £2.90 child, 10% discount EH members	Combined ticket with Vindolanda £6.00	Tourists to area. Appeals to families.	Very well.	Strong links to Vindolanda	Limited
Birdoswald Roman Fort	Residential Study Centre and Interactive visitor centre introduces you to Hadrian's Wall and follows Birdoswald's 2000-year history. Wall, fort turret and milecastle can all be seen.	GilslandB ramp-ton	Cumbria	Cumbria County Council	£3.00 adults, £2.50 concessions, £14.00 Family, 50% discount for EH Members		Tourists to area. Predominantly families. Also appeals to international students interested in the Study Centre	Very well	Limited to Cumbria side	Limited

**FIGURE 4.1 CONTINUED**

MAIN SITES	Description	Location	County	Ownership / Management	Admission	Cross Ticketing	Visitor Profile & how it appeals to target market	Extent to which it links to HW	Links to other HW sites	Links to other Attractions
Tullie House Museum and Art Gallery	City centre museum and art gallery. Contains displays about Hadrian's Wall, life in the Roman town of Luguvalium and Border History.	Carlisle	Cumbria	Carlisle City Council	£5.00 adults, £3.50 concessions, £2.50 child, £14.00 Family		Local & Tourist Market. Seems to appeal to families, seniors and school groups.	Very well	Limited	Good info rack and connection to Carlisle's TIC
Segedunum Roman Fort, Baths & Museum	Fort stood on the banks of the River Tyne and was the last outpost on Hadrian's Wall. New museum opened 2000 in the heart of urban industrial Tyneside, a setting which contrasts other museums along HW. It highlights the way in which landscapes can change through time, in a way that is not possible elsewhere along the WHS. Also houses a reconstructed bath house based on the surviving remains at Chesters.	Wallsend	Tyne & Wear	Tyne & Wear Museums	£3.50 adults, £1.95 child, £9.00 family		Local & domestic tourist market. Families and school groups.	Very well	Strong link to Arbeia	Limited

**FIGURE 4.1 CONTINUED**

MAIN SITES	Description	Location	County	Ownership / Management	Admission	Cross Ticketing	Visitor Profile & how it appeals to target market	Extent to which it links to HW	Links to other HW sites	Links to other Attractions
Senhouse Roman Museum	Museum houses Britain's oldest antiquarian collection tells of Roman life, religion and the Roman Army around the cliffs and seascapes of Cumbria.	Maryport	Cumbria	Senhouse Museum Trust	£2.00 adults, 75p child		Local market. Families, Seniors and school groups	Very well. Primarily Hadrian's Coast which is included as WHS.	Limited	Limited
Hadrian's Wall Path, National Trail	Recently opened walking path which extends the entire length of Hadrian's Wall from Wallsend in the east to Bowness-on-Solway on in the west.	Entire length of Hadrian's Wall	NH & Cumbria	Countryside Agency	No charge		Visitors to areas. Appeals to walkers	Very well. The path follows the wall.	Path links to sites along the wall's line.	New walking and accommodation guide refers to other attractions

*Source: Consultant Team led by BRC Imagination Arts*

**FIGURE 4.2  
BRIEF REVIEW OF MAIN HADRIANS WALL VISITOR ATTRACTIONS**

Main Sites	Directional Signage to Attraction	Parking	Sense of Arrival & Welcome	Presentation	Unique Features	Events & Activities	Education Programme	Facilities
Arbeia	Road signs need improvement. Needs more signage from the South Shields Metro Station to site.	Limited, free parking outside fort.	Needs improvement	Museum needs updating. Reconstruction buildings are very good and interesting. Good on-site docents. Good hands-on activities in TimeQuest. On-going excavations during Summer months in partnership with Earthwatch.	Full size modern reconstructions of the fort's West Gate, a barrack block and part of the Commanding Officer's house. Two headquarters buildings with associated strong rooms and wells, and a kiln for making tiles.	Yes	Extensive programme. Teacher's Pack containing activity sheets, Literacy pack, gallery interpreter in Time Quest. Handling collection available to loan. Education room available, with packaged lunches if pre-booked.	Overall facilities need upgrading. WC needs more stalls, cannot accommodate large groups. No café. Gift shop has sufficient selection.
Museum of Antiquities	Lacking	None. Parking in Newcastle City Centre car park	Little sense of arrival, tucked into building with other purposes.	Needs to bring collection to life. Old style graphics need to be replaced and updated.	Full Scale Model of Hadrian's Wall. Easy to see at a glance why the Wall follows the features and contours of the land and gives an impression of the scale of this amazing engineering feat (although dated it is still effective for giving an overall view of HW) and a Mithraeum		Education programme exists	No WC in Museum there is a WC in the adjacent building. No catering. Shop in a dull tight space, needs more room to display items more attractively.

**FIGURE 4.2 CONTINUED**

Main Sites	Directional Signage to Attraction	Parking	Sense of Arrival & Welcome	Presentation	Unique Features	Events & Activities	Education Programme	Facilities
Corbridge	Needs improvement	Free parking	Good	Small museum, would benefit from updating the displays. Interpretation of excavation mainly relies on A/V.	Famous Lanx Plate on display in museum.		Educational facilities and provisions for teachers, including handbooks.	WC - clean, gift shop, disabled access limited
Chesters	Adequate from B6318	Free parking for cars & coaches.	Good	Fort remains scattered and disappointing, excellent bath house, museum needs updating.	The finest bath house remains in Europe.	Yes	Provisions for teachers, including handbooks.	WC - clean & sufficient, Café in summer only
Housesteads	Good. Easy to see from B6318.	Fee to park. Operated by NNPA	Good – some confusion due to multiple ownership/management issues.	Good NT info centre. Small museum needs updating. Stunning views from site. Access to site limiting for elderly and disabled.	Panoramic Views - Lies on a great volcanic escarpment of Whin Sill, see granaries, barracks, only example of a Roman hospital, best example of roman latrines.		Provisions for teachers, including handbooks.	WC - clean & sufficient. Good quality light refreshments with indoor seating and outdoor picnic tables. Good NT gift shop, presented well.

**FIGURE 4.2 CONTINUED**

Main Sites	Directional Signage to Attraction	Parking	Sense of Arrival & Welcome	Presentation	Unique Features	Events & Activities	Education Programme	Facilities
Vindolanda	Confusing. Needs better directional signage on and off main road.	Free. Sufficient parking from main entrance. You can also park and enter from the museum side.	Needs improvement	Improvement needed throughout especially the interpretative panels that have been weathered on the archaeology site. Vindolanda has the potential of being one of the most interesting sites but needs upgrading from the moment a guest enters. Museum has a very interesting collection which is too static and needs to be more engaging. Ongoing excavation.	Living Archaeology Site. Rare ink on wood writing tables found here - one of Britain's top Roman treasures. See photographs.	Yes	Yes.	WC - clean & sufficient stalls. Good quality café with indoor and outdoor seating. Gift shop has a good selection of items that should be presented more attractively.
Roman Army Museum	Adequate from B6318	Free parking for cars & coaches.	Good	Museum has an interesting collection but is too static and needs to be more engaging.	Eagle's Eye Film - virtual guided tour of Hadrian's Wall	Yes	Yes	WC. Coffee shop
Birdoswald	Needs more directional signage off main road.	Free. Sufficient for number of visitors	Good	One of the better presented sites.	Amazing views across the Irthing valley	Yes. Includes an event run jointly with Tullie House.	Yes	WC - very clean & sufficient stalls. Excellent tearoom with sufficient indoor seating and outdoor picnic tables. Gift shop has a good selection which is presented well.

**FIGURE 4.2 CONTINUED**

Main Sites	Directional Signage to Attraction	Parking	Sense of Arrival & Welcome	Presentation	Unique Features	Events & Activities	Education Programme	Facilities
Tullie House	Very good signage from train station to museum.	Fee for cars & coaches parking nearby	Very good	Good exhibits with hands-on activities.	Stand on top of Hadrian's Wall and experience life as a Roman soldier	Yes. Includes an event run jointly with Birdoswald.	Extensive education programme.	WC - very clean & sufficient stalls. Extensive facilities for people with disabilities. Excellent restaurant with lots of indoor and outdoor seating. Outdoor area overlooks the gardens. Gift shop has a good selection which is presented well.
Sege-dunum	Confusing via car. Adequate signage from Wallsend Metro station.	Free parking for cars & coaches. Sufficient	Very good	The newest museum with lots of bells and whistles. Lots of kids' activities, interactive video and computer displays. A very good recreation of a bath house based on the one located at Chesters.	34m Panoramic tower overlooking the most complete Roman fort plan in Britain.	Yes	An extensive education programme, including workshops, planned activities and interactive storytelling.	WC - very clean & sufficient stalls with disabled & baby facilities. Good café on second level. Very good selection of retail items throughout first floor reception area.

**FIGURE 4.2 CONTINUED**

Main Sites	Directional Signage to Attraction	Parking	Sense of Arrival & Welcome	Presentation	Unique Features	Events & Activities	Education Programme	Facilities
Senhouse Roman Museum	Needs a lot of improvement. Difficult site to get to from main motorway and then to find once in Maryport. Access from Maryport train station limiting as you have to hike up a big hill.	Needs improvement. Difficult to get in and out when too many vehicles are parked.	Building is interesting & you can see the observation tower which overlooks the fort. Not much of the fort to look at other than grass.	Working with a shoestring budget they have a wonderful presence inside the museum with good interpretation panels. Outside panels are weathered and need to be replaced.	Outstanding collection of altars. The largest collection ever discovered, many had been deliberately buried and are so are perfectly preserved. Solway Coast shows how Hadrian's army controlled the Irish Sea, the Empire's only fortified maritime frontier	Yes	Yes. Focuses on local schools and children. Teacher's pack.	Only one WC for gentlemen & one for ladies. Insufficient when larger groups arrive. No café but sell soft drinks and ice creams. No gift shop. Limited number of retail items available at reception desk.

*Source: Consultant Team led by BRC Imagination Arts*

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## ***Current Visitors***

- 4.32 Visitors to Hadrian's Wall can be divided into three main segments, visitors to the heritage sites and museums connected to the Wall, walkers and cyclists along the line of the Wall, and general sightseeing visitors. There is a degree of cross-over between the segments, with, for example, a proportion of walkers, making visits to heritage sites and museums during their walk.
- 4.33 The long, linear nature of Hadrian's Wall makes it difficult to accurately estimate how many people visit it each year. Whilst historic attendance levels are available for the museums and historical sites along the length of the wall, these reflect visits rather than visitors. Even more difficult to assess are the number of walkers who visit the Wall each year. There are counters set up along the route of the wall which indicate the number of people passing by a given point. However as the distance covered by walkers varies considerably, it is not possible to relate the individual counts to a total number of walkers. In addition to museum and historic site visits and walkers, there are also a number of more general sightseeing visits made to the Wall each year. In the following sections we set out the best estimates of the current visitor levels and the profile of visitors.

## **Visits to Museums and Historic Sites**

### Attendance Levels

- 4.34 Figure 4.3 sets out attendance levels at the main museums and historic sites associated with Hadrian's Wall, over the past four years. In total just under 583,000 visits are estimated to have been made to the 11 sites in 2003, a four percent growth on 2002. This growth, which occurred across the majority of sites, is attributed to publicity on the Wall relating to the launch of the National Trail in May and particularly fine weather throughout the spring, summer and autumn months benefiting the largely outdoor sites.
- 4.35 Tullie House and Corbridge were the only two sites to experience a decline in visitors during 2003. In the case of Tullie House this is attributed to an increase in admission price, the competing display of the Roman Finds (excavated from beneath Tullie House) at the nearby Castle Museum and losing out to outdoor attractions during the hot summer months. The Corbridge site is believed to have suffered due to being away from the line of the Wall. From the end of May 2003 onwards, following the launch of the National Trail, the line of the Wall was the main focus of Hadrian's Wall related communications.
- 4.36 The restricted access to the countryside in 2001 due to foot and mouth disease (which started in nearby Heddon) resulted in sharp declines in attendance at most of the central section sites during that year. This particularly impacted Housesteads, which was closed for seven months of that year. By contrast, a number of the city based sites experienced growth in attendance, as fear of restricted access to the countryside, led to more city focused sightseeing.

**FIGURE 4.3**  
**ANNUAL ATTENDANCE FOR MAIN HADRIAN'S WALL SITES, 2000 TO 2003(E)**

Site	2000 Attendance (000's)	2001 Attendance (000's)	2002 Attendance (000's)	2003(e) Attendance (000's)
<b>North West Sites</b>				
Senhouse, Maryport	6.2	7.9	6.5	6.7
Tullie House, Carlisle	40.1	48.9	47.5	32.9
Birdoswald	36.7	31.1	35.4	39.0
<b>North East Sites</b>				
Roman Army Museum	45.9	37.8	45.7	52.0
Vindolanda	70.8	66.2	78.8	87.0
Housesteads	110.2	12.4	106.4	115.4
Chesters	69.8	58.2	61.5	64.5
Corbridge	20.3	16.6	21.0	16.5
Museum of Antiquities	15.8	15.5	17.7	18.9
Segedunum	43.3	60.7	44.3	50.5
Arbeia	78.5	99.4	97.9	99.7
<b>Overall Total</b>	<b>537.4</b>	<b>454.6</b>	<b>562.6</b>	<b>583.1</b>

*Source: Hadrian's Wall Tourism Partnership*

- 4.37 Whilst recent attendance levels appear to reflect a growth trend in attendance (allowing for the exceptional circumstances of 2001), they are still considerably lower than the peak attendances experienced in the 1970's, following the discovery of the writing tablets at Vindolanda.
- 4.38 Vindolanda's attendance levels peaked in the mid 1970's at 110,000 visits per annum. Vindolanda's 2003 attendance level was some 20 percent below this peak figure. Housesteads and Chesters peaked in the early 1970's, with attendance levels of 175,000 and 129,000 respectively. Attendance levels at Housesteads in 2003 represented just two thirds of the peak 1970's level. At Chesters, the 2003 attendance represented just half the 1970's peak.
- 4.39 In comparing historic performance to current attendance levels it is important to note that competition for visitors' time and spend is far greater today than it was thirty years ago. Changes in the provision of daytime entertainment, the development of leisure retail, and the growth in the supply of visitor attractions (even amongst heritage and museum sites along the Hadrian's Wall WHS) have all contributed towards making it a far more competitive environment.
- 4.40 An audit of visitors to Hadrian's Wall was conducted at the main sites along the Wall by MEW Research, between Easter and the end of October 2003. The findings indicate that on average respondents had either visited or planned to visit just over two sites during their stay in the area. However, it is known that respondents typically over claim when answering questions on their intentions.

In addition, walking sites and other local sites were included in the locations visited, leading to a higher average. Taking these factors into consideration, together with previous visitor research conducted on Hadrian's Wall, and allowing for the relatively low representation of walkers in the survey, we estimate that on average visitors to the Wall currently make 1.3 site visits per trip.

- 4.41 On this basis, the 583,000 visits to the main museums and historic sites along Hadrian's Wall in 2003 are estimated to equate to 458,000 visitors.

### **Serious Walkers**

- 4.42 The Countryside Agency estimate that between 3,500 and 4,000 people walked the complete 84-mile National Trail in 2003. The data relates to the full calendar year, although the National Trail only officially opened on 23<sup>rd</sup> May 2003.
- 4.43 In October 2003 many national papers incorrectly reported that the National Trail had been closed, following concerns over the erosion of the trail and the removal of the Trail Passport. This is believed to have caused some reduction in the numbers using the trail, although many walkers reportedly continued with their plans to walk parts of the trail.
- 4.44 There are 16 counters along the trail that monitor the number of people passing by set points. Of these, just three were in operation throughout 2003. The lowest count was registered at Burgh-by-Sands, on the Solway coast, at just 2,625 for the year, and the highest count was registered at the Housesteads track, at 210,758 for the year. August and July were the most popular months, between them accounting for nearly 55 percent of the annual total.
- 4.45 The Housesteads track counter is passed by every visitor to Housesteads Fort, with each visitor being counted twice, both on the route up to the Fort and on their return to the car park. The next highest counts were taken at sites along the National Trail that are close to car parks, ranging from around 35,000 to 43,000 (nb not all of these reflect a full year). Considerably lower counts ranging from 2,600 to 7,000, at counters positioned along the Trail at points in between car parks, indicate that the majority of trail users are probably on circular day walks using the car parks as a base.
- 4.46 It is not possible to estimate from the counts the actual number of visitors walking along the Wall as there will be an element of double counting, either due to walkers crossing a count point more than once, or through walkers passing through more than one counter.
- 4.47 For the purpose of the Major Study serious walkers have been defined as those that walk along the path of the Wall for in excess of two hours. The number of such walkers has been estimated to be 31,000 in 2003. This estimate has been arrived at by using previous research findings, reported in Appendix II of the 2002 Economic Impact Study for the Central Section of Hadrian's Wall. For this study, research surveys commissioned by different bodies, including the standard national parks surveys and a tourism survey by the Northumbria Tourist Board going back to the early 1990's, were analysed.

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## **General Sightseers and Short Walkers**

- 4.48 In addition to visiting specific museums and/or heritage sites, and taking longer walks by the Wall, there are a number of visitors who are making a more general sightseeing trip to the area, some of whom may walk short sections of the Wall. In 2003, we estimate that 287,000 visitors fell into these categories.
- 4.49 In the surveys analysed in the 2002 Central Section Study, the intercept research found visitors at or near the sites who had stopped in the car park intending not to visit the site, but just to use the toilets or other such facilities. Other surveys identified visitors who did not fulfil their intention to visit a site but were present in the Wall area. Others attended an event at a Wall site but did not go through a pay boundary. In addition, anecdotal evidence from car parking staff revealed that it was quite common for coach parties to use Housesteads for a comfort stop only. All of these visitor types were counted in a ratio to the paying visitors as indicated by the surveys.

## **Visitor Profile**

- 4.50 The 2003 Visitor Audit, conducted by MEW Research, provides data on the typical visitor to Hadrian's Wall. A summary of the key findings of the research is given below. The full findings are set out in Appendix 2.
- 4.51 Figure 4.4 sets out the profile of visitors to the Wall, comparing visitors who are visiting attractions during their trip, with those that are walking for more than two hours during their trip. There is considerable overlap between these two sectors, with many visitors combining walking and visiting sites.
- 4.52 Compared to the profile of the UK population as a whole, visitors to Hadrian's Wall tend to be older, with 27 percent aged 55 or older. Just under a third of all visitors researched brought children with them, although this falls to below a quarter for serious walkers.
- 4.53 Just under two-thirds of visitors were staying overnight away from home. Of these over half were just visiting areas within ten miles of the line of the Wall, with the remainder also visiting other areas during their trip. Serious walkers were more likely to be staying away from home than attraction visitors, at 77 percent compared to 69 percent. Not surprisingly, they were also more likely than attraction visitors to be concentrating their activities in the area around the Wall.
- 4.54 Just over 40 percent of visitors were on their first visit to the Hadrian's Wall area, while a quarter of all visitors had made more than five previous trips to the area.

**FIGURE 4.4  
PROFILE OF VISITORS TO HADRIAN'S WALL**

Profile	All Visitors	Attraction Visitors	Serious Walkers (over two hours)
	(%)	(%)	(%)
<b>Age</b>			
0-16 yrs	22	23	18
17-34 yrs	12	11	11
35-54 yrs	39	39	45
Over 55 yrs	27	27	27
<b>Children in Party</b>			
Yes	32	31	23
No	68	69	77
<b>Type of Visitor</b>			
Day	36	31	23
Stay	64	69	77
<b>Origin</b>			
North of England	49	44	37
Other Britain	41	45	50
Overseas	10	11	13

*Source: MEW Research 2003 Visitor Audit*

## **SUPPORTING INFRASTRUCTURE**

- 4.55 The consumer research highlighted the confusion caused by the road signage currently employed to direct visitors to the various sections of the Wall, and to the heritage sites and museums along the route of the Wall. The sheer number of signs led to concerns that no one destination would be of a sufficient scale to warrant a visit.
- 4.56 The Visitor Audit asked respondents how easy it had been to find places to eat and drink and to find accommodation; it also asked how good the quality of provision was. Respondents were best satisfied with the ease of finding facilities and their quality during the peak summer months. However, even at this time the average scores given were good as opposed to very good; indicating that for some respondents the experience was not of a sufficiently high standard. Outside of the peak season it was more difficult to find facilities, and respondents were less likely to be satisfied with the quality of provision.
- 4.57 These findings were confirmed by many of the stakeholder interviews. During these a number of concerns were raised about the current provision of visitor related infrastructure and the negative impact this was seen to have on encouraging visits to the Wall.

- 4.58 In general it was felt that local businesses (excluding those specifically involved in tourism) in the Hadrian's Wall area were not convinced of the benefits of tourism. Even businesses involved in tourism were felt to disregard the practicalities of tourists' requirements – such as year round accommodation, Sunday and evening opening etc. It was reported that local businesses believe that tourists don't spend on UK breaks, and that as a result the businesses set their standards for food and accommodation low, in response to this perception.
- 4.59 Interestingly, the findings of the Visitor Audit and other research conducted by VisitBritain, indicate a growing willingness amongst tourists, including the walking market, to spend money on good quality UK breaks.
- 4.60 Lack of convenient public transport or packaged coach trips were seen by stakeholders to be a barrier to encouraging the international market to make excursions from Newcastle.
- 4.61 In general, the accommodation, retail and catering currently provided were felt to be of mediocre quality, with the lack of larger hotels (50 plus beds) restricting the opportunity for overnight excursion trips to stop at Hadrian's Wall. Quality accommodation and catering was felt to be lacking outside of the main towns/cities. In relation to this point, the consultant team noted that in Market Towns such as Haltwhistle, the current retail and catering offer appears to be targeted purely at local residents, rather than at the relatively upmarket profile of tourists visiting Hadrian's Wall.
- 4.62 The objectives of accommodation providers and tourists were felt to be at odds. The B&Bs' aims of targeting a two to three night stay was felt to conflict with tourists touring in the area wanting to move on each night. There was felt to be a lack of packaged products designed from a customer focus. There was also seen to be a lack of co-ordinated booking for accommodation, particularly for those on tours.
- 4.63 Road signage to sites was felt to be patchy and in urgent need of overhaul and rationalisation. Restrictions in available parking were noted as an issue for some sites, particularly in the Central Section.

## **ORGANISATION**

- 4.64 Hadrian's Wall is a large archaeological artefact running from coast to coast, from Cumbria through to Tyne and Wear for some 80 miles or so along coastal strips, across remote and wild landscapes and through a major conurbation. It is in the multiple ownership of a wide variety of individuals and organisations. These owners range from individual farmer businesses to national heritage bodies, charities and public local authorities each with their own agenda and interests to pursue. There are also many other public authorities with their own special interest in the Wall or its unique landscape and mainly rural setting. This is a complex and difficult organisational situation.
- 4.65 In addition, owing to the significant historic value of the Wall as a national monument, it is naturally closely supervised by English Heritage to ensure that it is properly protected through the planning system. Similarly, much of its

landscape setting is the responsibility of other public national interests such as the Northumberland National Park Authority and the Countryside Agency. All of this supervision is perceived to be negative, especially by many owners, devised to limit what can be done on any property as it may affect the condition of the Wall or its setting.

4.66 With the inscription of the Wall as a World Heritage Site in 1987, there have been valuable attempts to rationalise the disparate organisational situation of the Wall, draw together all the various interests and participants and begin to offer a more positive approach to its overall supervision and management - especially for the benefit of visitors to the area. Accordingly, two organisations have been formed to represent all necessary interests:

- The Hadrian's Wall Co-ordination Unit (HWCU) – responsible for implementing the Hadrian's Wall World Heritage Site Management Plan.
- The Hadrian's Wall Tourism Partnership (HWTP) – responsible for the promotion of the WHS to its visitors.

4.67 Over recent years, these bodies have effected an improvement in the profile of the Wall with the public at large and with the local community. However, this very success has also actually indicated the real potential of the Wall, particularly as a tourist attraction of global interest and, in so doing, has also identified the distinct limitations of even these relatively recent organisations, particularly the HWTP, to realise this potential. They have been criticised in the main for the following faults, which are possibly inherent in the huge partnerships necessarily involved in the current organisational structure rather than any fault of their actual activities or internal management skills:

- There is a distinct lack of leadership, with no clear authority given to anyone to identify a Vision for the whole Wall, establish clear policies to realise such a Vision, determine key priorities for investment for the whole Wall, and implement positive development and operational programmes. To achieve this would naturally involve elements of risk. The current structure is markedly risk averse.
- The partnerships are necessarily large and unwieldy, representing every possible interest as they do. Decision-making is therefore difficult and long-winded with a tendency to work to the 'lowest common denominator' – i.e. what can stimulate the least number of objections within the partnership.
- The partnerships rely on external funding sources to pay for their activities and therefore there is a natural tendency for them to work to the agendas of these funding sources rather than the interests of the Wall as a whole itself.
- What funding is made available (or more likely fought hard for) has to be seen to be spread around the partnership for 'political' reasons. Such funding is usually relatively limited in size, short-term in nature and allocated to achieve often limited specific outputs.

4.68 The value of the current structure and its achievements is the fact that they have demonstrated the potential of the Wall is but that it is unlikely to be realised using these existing structures. It is therefore time to take the next

organisational step to enable this potential to be more fully realised through proper levels of capital and revenue investment on a Wall-wide basis.

## ***BRANDING AND COMMUNICATION***

- 4.69 Just prior to the commencement of the Hadrian's Wall Major Study, a new branding treatment had been created, led by the HWTP in consultation with the various stakeholders. The consultants' team were briefed on the new branding treatment in April 2003 by HWTP and Alcazar, the agency who developed the work. Feedback on the new brand was also given by a number of stakeholders during the consultations held with them at the commencement of the study.
- 4.70 The aim of the new treatment was to present a broader offer for Hadrian's Wall than was seen to have been the case with the previous WHS identity and the turrets logo. The objective was to address the concerns of HWTP and Alcazar that a purely Roman focused offer held too narrow an appeal to attract visitors to the area. It also sought to satisfy HWTP's remit of promoting a wide corridor around the line of Hadrian's Wall. This was done through the development of the 'Hadrian's Wall Country' brand. Executions were aimed at showing the breadth of alternative activities that could be enjoyed in the area, in each case featuring a Roman soldier enjoying the activity, to link the communication to Hadrian's Wall.
- 4.71 A logo was also designed to represent Hadrian's Wall Country, featuring three separate areas with a line running through them.
- 4.72 The consultants' team was asked to give feedback on the new branding treatment at the Major Study Steering Group meeting in May 2003. The feedback was based on the expert opinions of the consultant team and comments provided by key stakeholders.
- 4.73 The team expressed concern that the Hadrian's Wall Country branding had not identified any true differentiators that would attract new visitors to Hadrian's Wall, and hence to the regions. The branding was seen to present a generic leisure offer (swimming pools and picnics) with the Wall itself relegated to a backdrop, and in a manner that potentially confirms the current image perceptions that Hadrian's Wall is just a broken down wall in empty countryside. Effectively the remit of HWTP to represent the corridor as a whole had led to the communication of the WHS itself, the unique aspect of the area, being lost within the communication of a new broader product, Hadrian's Wall Country.
- 4.74 The feedback from key stakeholders was largely in agreement with the consultant team's view, despite the involvement of many of the stakeholder organisations in the consultation process undertaken by HWTP in arriving at the new branding treatment. Senior representatives of many of the organisations reported that the new treatment was a backward step that was inappropriate for taking the market development of the Wall forward in the right market place.
- 4.75 Communication of Hadrian's Wall was reported by HWTP to be constrained by limited marketing budgets, with a total of £830,000 available for marketing and ICT from the Single Regeneration Budget (SRB) 'Presenting Hadrian's Wall'

project, over the five year life of the project. Further funding is provided by partner contributions and EU funding.

- 4.76 The relatively low scale of the available budget and the expenditure of a large proportion of it on developing the new brand 'Hadrian's Wall Country', has precluded any major marketing communication outside the region, severely limiting the opportunity to draw new tourism revenues into the region.
- 4.77 Marketing activity is largely focused on leaflet production and distribution, attendance at trade shows, PR and advertising in consumer and trade press. The focus of the activity is UK based, much of it within the region. Overseas marketing is largely conducted through Visit Britain publications and joint activity with NTB at selected trade fairs.

**MARKET ASSESSMENT**

**Overview of UK Markets**

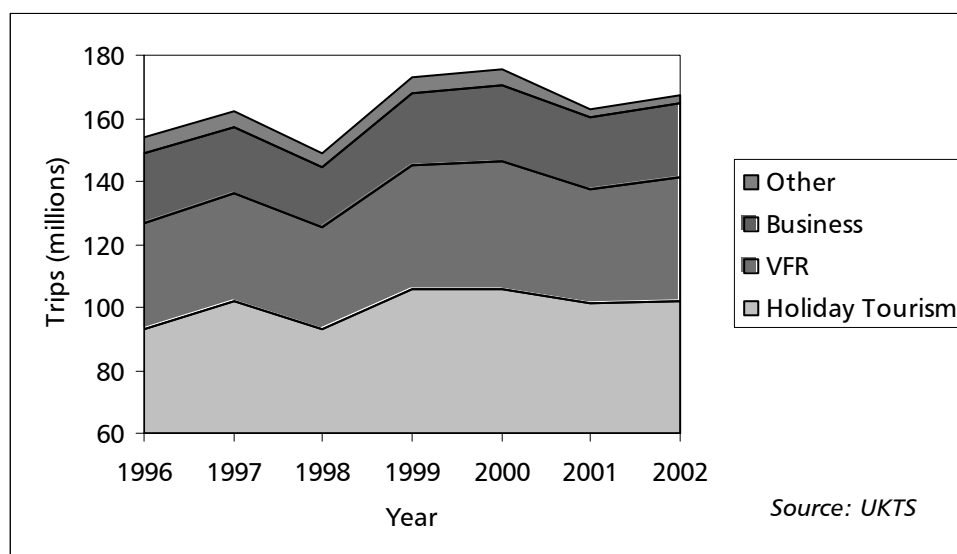
- 4.78 The following section reviews overall trends in UK tourism and provides initial top line data on the markets currently available to Hadrian's Wall. The data shown is sourced from the United Kingdom Tourism Survey and International Passenger Survey, conducted each year on behalf of Visit Britain.

**UK Tourist Market Trends**

Domestic Tourism within the UK

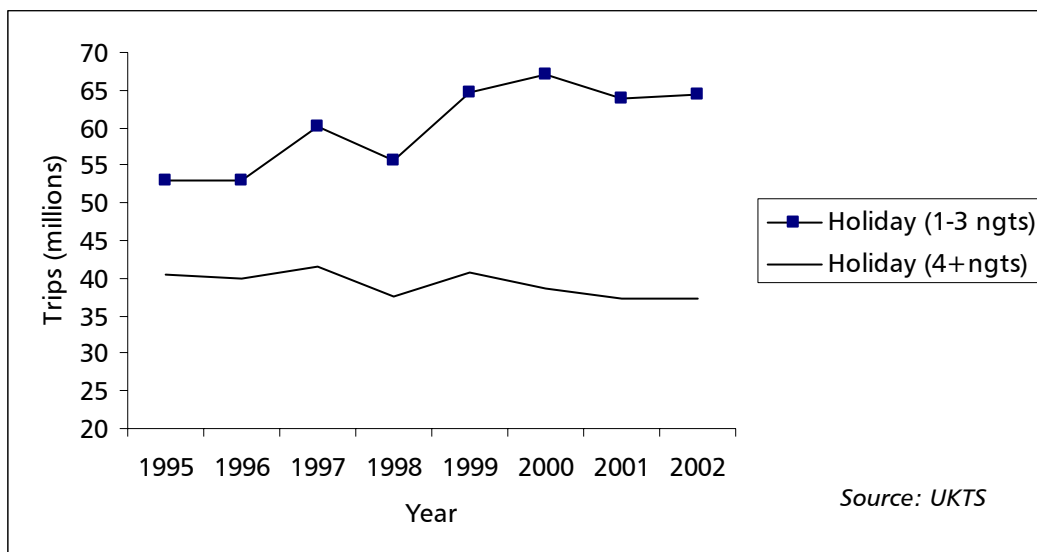
- 4.79 Despite the growth in low cost airlines and the popularity of overseas travel, UK residents are still more than twice as likely to take an overnight trip within the UK, as they are to travel abroad. Figure 4.5 shows volumes of domestic tourism trips over time and by purpose of trip.

**FIGURE 4.5  
DOMESTIC TOURISM IN THE UK, 1995 - 2002**



- 4.80 In total, 175 million trips were taken by UK residents in the UK in 2000, a 19 percent growth on 1995, with holiday tourism and visiting friends and relatives accounting for over 80 percent of the total. The well publicised events of 2001 (foot and mouth disease, September 11th, and the downturn in world economy) led to a seven percent fall in 2001. In 2002 there was a partial recovery, however the total number of trips remained below the peak year of 2000..
- 4.81 However, as shown in Figure 4.6, fewer domestic main holidays are being taken in the UK than previously, and the growth in total trips has been driven by the increasing popularity of taking short breaks rather than a longer annual trip in the UK.
- 4.82 The number of trips of one to three nights' duration increased by 27 percent between 1995 and 2000, whereas trips of four or more nights fell by five percent.

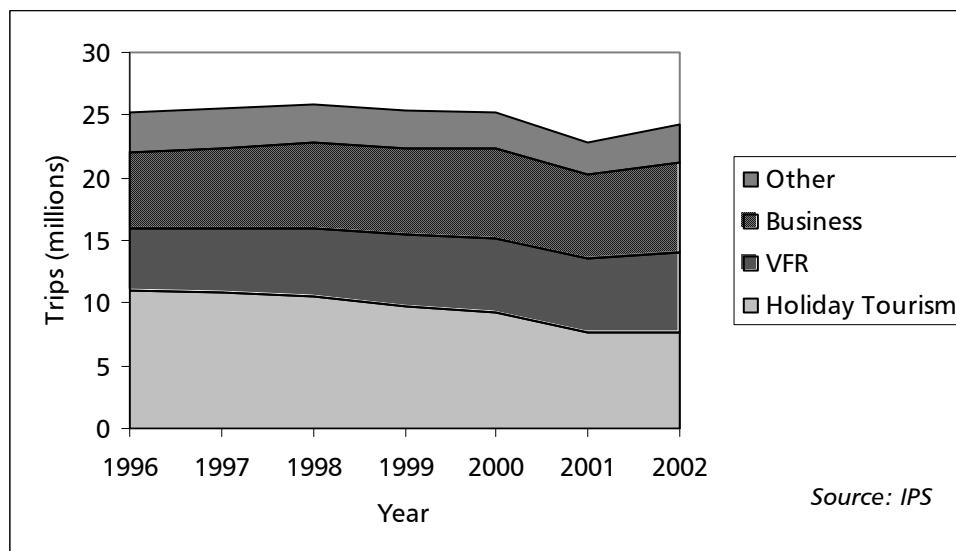
**FIGURE 4.6  
DOMESTIC HOLIDAY TOURISM TO THE UK: TRENDS IN LENGTH OF HOLIDAY, 1995-2002**



*International Tourism to the UK*

- 4.83 The total volume of international tourism to the UK was fairly stagnant throughout the late 1990's, at around 25 million trips per annum. However, as shown in Figure 4.7, whilst the number of international travellers visiting family and friends and on business travel grew over this period, the numbers taking holidays in the UK has been steadily declining, with the issues of 2001 driving further declines. Overall international tourism to the UK showed some recovery in 2002, however holiday tourism continued to decline.

**FIGURE 4.7  
INTERNATIONAL TOURISM IN THE UK 1995-2002**



## ***Hadrian's Wall Markets***

### **Introduction and Definition of Market Areas**

- 4.84 The following section identifies the scale of the markets currently available to Hadrian's Wall, including both residents living within day trip distance of the wall and tourists currently on holiday within day trip travel distance of the Wall.
- 4.85 ERA standard practice is to define the available market for a site as residents living within two hours' drive time of the site and tourists staying within one hour's drive time of the site. The linear nature of the Hadrian's Wall study site requires an adaptation of this method of assessing markets. We have therefore defined the market as those residents living within 80 miles of any point along the line of the wall (to represent an average of two hours' drive), and those tourists staying within 40 miles of any point along the line of the wall (to represent an average of one hour's drive).
- 4.86 We have reviewed the size and characteristics of these available resident and tourist markets, with market populations defined as outlined above. As propensity to visit attractions decreases with travel time, we have sub-divided the resident markets for into primary and secondary markets, with the primary market comprising those residents living within 0 to 40 miles' drive from any point along the wall and the secondary market comprising those residents living within 40 to 80 miles' drive from the wall.
- 4.87 The tourist markets are sub-divided into domestic and international tourist markets.

## Available Markets

4.88 The available markets are set out in Figure 4.8.

**FIGURE 4.8  
HADRIAN'S WALL MARKETS, 2000**

	Market Size
	<i>(000's)</i>
Primary Resident Market	2,439
Secondary Resident Market	1,877
<b>Total Resident Market</b>	<b>4,316</b>
Domestic Tourist	4,392
International Tourist	559
<b>Total Tourist Market</b>	<b>4,951</b>
<b>Overall Total</b>	<b>9,267</b>

*Source: ONS, Star UK and Economics Research Associates*

- 4.89 In total some 9.3 million residents and tourists are within day trip distance of Hadrian's Wall. The resident population is relatively low, at just over four million living within 80 miles' drive. This reflects the remoteness of much of the study site. Unusually, and more positively, more than half of these residents live in the primary market, less than 40 miles' drive away from Hadrian's Wall. The primary population is heavily biased towards the North East, with 85 percent living in the region.
- 4.90 The available tourist market for the study site is fairly strong for a UK region. In total, some 7.5 million overnight tourist visits are made to locations within 40 miles' drive of the wall, of which over 6.9 million are made by UK residents. International visits are relatively low in number; typically international tourist visits to England tend to be concentrated on the South of the country. However, over a third of the domestic tourist visits are made by UK residents living within 80 miles' drive of the wall, and hence these people are already reflected in the resident market. To avoid double counting, the domestic tourist volumes shown in Figure 4.8 have been adjusted to allow for this overlap, giving a total tourist figure of just under five million staying within 40 miles of Hadrian's Wall.
- 4.91 Not surprisingly, the current key locations for tourist visits are Cumbria (with the Lake District) and Tyne and Wear. Further details of the available markets are set out in Figure 4.9.

**FIGURE 4.9  
HADRIAN'S WALL MARKETS, 2000**

Location of Market	Resident Market		Tourist Market (0 – 40 miles)		Total Markets		Combined Market
	Primary (0 – 40 miles)	Secondary (0 – 40 miles)	Domestic	International	Resident	Tourist	
	(000's)	(000's)	(000's)	(000's)	(000's)	(000's)	(000's)
Northumberland	246	61	508	40	307	548	855
Tyne & Wear	1,076	0	1,206	290	1,076	1,496	2,572
Durham	395	99	457	56	494	513	1,007
Tees Valley	362	276	228	24	638	252	890
Cumbria	317	171	1,856	136	488	1,992	2,480
Lancashire	0	227	0	0	227	0	227
N. Yorkshire	0	492	0	0	492	0	492
Scotland	43	551	137	13	594	150	744
<b>Total</b>	<b>2,439</b>	<b>1,877</b>	<b>4,392</b>	<b>559</b>	<b>4,316</b>	<b>4,951</b>	<b>9,267</b>

Source: ONS, Star UK and Economics Research Associates

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## ***SUMMARY OF FACT FINDING STAGE***

### ***The Current Visitor Experience***

#### **Lessons from Consumers**

- 4.92 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.
- 4.93 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.
- 4.94 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 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.
- 4.95 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**

- 4.96 The stakeholders have a strong belief in the potential of the Wall, but recognise that changes are required to the product and the supporting infrastructure in order to realise this potential.
- 4.97 The need to persuade local businesses and communities of the benefits that tourism can bring was felt to be key to achieving this change. 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.
- 4.98 The stakeholders also expressed concerns about the current organisational set-up. The current partnerships were seen to be too large and unwieldy, due to their requirement to represent the interests of all the partners involved. As a result there was seen to be a lack of leadership, with no clear authority given to any one organisation. The nature of the partnerships' funding was also seen to require the partnerships to work to the agendas of the funding sources, which were not always seen to be consistent with the interests of the Wall.
- 4.99 A further area of concern 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, senior representatives of many of the organisations

reported that the new treatment was a backward step that was inappropriate for moving the Wall forward.

### ***Current Visitor Volumes***

4.100 There were estimated to be 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***

4.101 In total 4.3 million people reside within 80 miles drive of the length of Hadrian's Wall. Of these, 2.4 million live within 40 miles drive and 1.9 million live within 40 to 80 miles drive. Both populations are relatively low, compared to other locations within the UK, reflecting the need for the Major Study to attract new visitors into the region in order to avoid substitution from existing visitor offers..

4.102 There are already some 5.0 million tourists staying within 40 miles drive of the length of Hadrian's Wall. The majority, 4.4 million, are domestic tourists. The majority of tourist visits are currently made to Cumbria, to the Lake District, and to the City of Newcastle.

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## 5. REVIEW OF COMPARABLE DEVELOPMENTS

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### *INTRODUCTION*

- 5.1 In the following section we summarise research undertaken into the performance of comparable locations worldwide, identifying any lessons that may be learnt from either their development history or operating performance worthy of note, when considering possible options for the future of Hadrian's Wall.
- 5.2 Our research for this section involved desk research and a series of telephone interviews with representatives from each of the developments. The complexity of the Hadrian's Wall experience, with its selection of visitor sites, set within varying landscapes, along the route of the Wall, made it difficult to find direct comparables. However, through stakeholder interviews and the consultant team's existing knowledge and experience, a number of locations were identified that could be compared with Hadrian's Wall.
- 5.3 In selecting the comparables we considered sites that consisted of more than one visitor element, and where the individual elements were linked in one of four ways:

### *A Story Link*

- 5.4 A story link is, for example, sites relating to a single person or a period in history. For Hadrian's Wall the story link is the Romans. The comparables reviewed were:
- ***Looking for Lincoln*** which is a project with a link between sites that have an Abraham Lincoln 'story' in central Illinois. It covers nine counties and 13 communities and is in the process of expanding. In its current form it comprises 15 visitor sites, each with their own management team.
  - ***The Ironbridge Gorge WHS and the Ironbridge Gorge Museum Trust*** which manages ten museums set within six square miles of the iron footbridge across the river Severn, in Shropshire. The WHS takes its name from the world's first iron bridge that spans the river and it was designated a World Heritage Site in 1986.

### *A Commonality in Structure*

- 5.5 A commonality in structure is, for example, castles or lighthouses. For Hadrian's Wall the commonality of structure is the archaeological excavations. The comparables reviewed were:
- ***The Loire Chateaux*** These internationally famous chateaux are set along the valleys of the Loire and its tributaries in the centre of France. Some of the 33 chateaux are privately owned, the remainder are owned by the state and are managed by Monum, the Centre des Monuments Nationaux, which manages all state owned monuments in France. It is a World Heritage Site.

- **The 'Cathare Chateaux'** are a series of over 40 castles, abbeys and fortified villages along what was in the Middle Ages, the French-Spanish border in south-east France. Some are in a good state of preservation, others are in ruins. They are found in rural and urban settings. Nearly every village in the region has a castle.

### **A Physical Link**

5.6 A physical link relates to, for example, being along the line of a road, or a canal. For Hadrian's Wall the physical link is the Wall itself. Our comparables were:

- **Illinois & Michigan Canal National Heritage Corridor** was created by Congress in 1984 to recognise the national significance of the canal. At 97 miles long, the Corridor is an affiliated area of the National Park System; however, the canal and its resources are owned or managed by state and local governments, not the federal government. The Corridor passes through several communities and encompasses many attractions which are owned by various different public and private organisations. The length of the Corridor, the mix of stakeholders and the range of attractions alongside it, make its development of interest to the Hadrian's Wall Major Study.
- **Route 66 (California)** was originally built to link the various communities along the 2,400 miles between Los Angeles and Chicago. It was designated as Highway 66 in 1926 and decommissioned in 1985, to be replaced by new interstate highways bypassing the towns and villages along the route. The route holds romantic and historical associations for many Americans, especially those who listened to Chuck Berry and/or the Rolling Stones singing the rock and roll number Route 66 in their youth. In 1999, Congress passed the Route 66 Corridor Act 'To preserve the cultural resources of the Route 66 corridor and to authorise the Secretary of the Interior to provide assistance'.

### **National Parks**

5.7 Two UK National Parks were also reviewed, reflecting the importance of the landscape setting to Hadrian's Wall. These were:

- **The Yorkshire Dales National Park** which was designated in 1954. It covers 1773 square km and includes some 30 attractions.
- **The Peak District National Park** which covers 1438 square km and includes some 60 attractions.

### **Other Comparable Locations**

5.8 During the course of the study further comparable sites have been reviewed to help the understanding of specific issues, for example the use of bus tours at Bru Na Boinne, in Ireland, to identify ways of managing access to environmentally sensitive sites.

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**Bru Na Boinne Visitor Centre**

- 5.9 Following a programme of excavation and restoration in the 1960's and 1970's the number of tourists visiting the Newgrange Neolithic monument in Bru na Boinne, Ireland, grew substantially. The potential harmful effect on the monument of uncontrolled access by large numbers of visitors was recognised and actions were taken to manage visitor flow. Initially this was restricted to structured opening hours and the provision of a guide service. However, attendances continued to increase until, in 1987, compulsory advance booking for tour groups was introduced. Individual visitors needed to arrive early in the day to ensure admission.
- 5.10 In 1991 the opening to the public of part of the Knowth site temporarily eased the situation. However, the large number of visitors to Newgrange was by now not only creating problems in terms of wear and tear on the monument, but also in terms of traffic congestion, litter, illegal trading and the need for increased security, parking and toilet facilities.
- 5.11 The Bru Na Boinne Visitor Centre was opened in June 1997, with the primary purpose of managing the flow of visitors around Newgrange and Knowth. The centre provides an interpretation of the Neolithic monuments of Newgrange, Knowth and Dowth and acts as a starting point for visits to these monuments, and other sites in Bru na Boinne. It is now the only route by which visitors can access either Newgrange or Knowth. Visitors park at the centre and are then taken by shuttle bus to the monuments. A range of tickets are available allowing visitors to select which of the monuments they wish to visit in addition to the visitor centre.
- 5.12 The aim in introducing the visitor centre was to reduce the number of visitors at Newgrange, whilst continuing to give visitors an introduction to the monument. The centre has been successful in this aim. Just over 150,000 visits were made to Newgrange in 1996, the year before the visitor centre opened. By 2000 the annual attendance at Newgrange had fallen to just over 130,000. However the total number of visits to the site grew from just under 200,000 in 1996 to just under 240,000 in 2000.

***FINDINGS FROM COMPARABLE LOCATIONS***

- 5.13 The interviews covered the following areas:
- Organisational structure.
  - Description of development.
  - Visitor experience.
  - Key issues.
  - Economic impact.
  - Lessons for Hadrian's Wall.
- 5.14 The extent to which the interviewees were able or willing to provide the information requested varied considerably. The key findings for eight of the

selected comparable developments and their implications for the Major Study are set out in Appendix 3.

- 5.15 In the rest of this section we draw together some general observations and lessons learned for Hadrian's Wall.

### ***Lessons Learned***

#### **Economic Benefits**

- 5.16 The main observation to make on economic benefits are that, considering how many of these large projects had been engineered for the purpose of economic development, we found few studies which had been undertaken to monitor the state aid which had gone into the interesting examples of linked multi-site projects. Our own National Parks are an exception.
- 5.17 In other instances some were underway, planned or not available to us. The Illinois Heritage Preservation Agency is currently undertaking a Regional Tourism Economic Study and the National Alliance of National Heritage Areas is looking into procedures for assessing the economic impact of the Illinois and Michigan Canal Corridor on the region, but to date no studies have been completed. We understand that there have been some studies undertaken on Route 66, but we were not able to obtain details.
- 5.18 Apart from the UK there did not appear to be readily available sources of data on the performance of the projects themselves or the individual sites.

#### **Organisational Issues**

- 5.19 Ironbridge Gorge WHS was excellent examples of a multi-site project which benefited substantially from a strong organisation. The Ironbridge Museum Trust manages all 10 of the sites under a single ownership and by promoting them all as the Ironbridge Gorge; it has been able to raise the profile of the whole site to an extent that would not normally be possible for any one of the museums on its own.
- 5.20 The Looking for Lincoln project is an example of the challenges involved in getting disparate parties to work together in the absence of a formal organisational structure with devolved powers. The project was able to go further in the collaborative approach to development than Hadrian's Wall has to date, with a co-ordinated approach to story-lines and content. This was a significant challenge initially but the need to work together brought about an improvement in relations. However no formal structure exists which means the improved relationships may not be sustainable over time.
- 5.21 There were also examples where a weak form of collaboration meant that the concept of a linked set of sites was limited in its ability to raise their profile; these were the Cathare chateaux in the South west of France.

- 5.22 Despite a novel and innovatory concept, the individual sites along the Route 66 corridor had a propensity to pursue singular ends rather than a federal approach and this is likely to be the main inhibiting factor in its growth and development.

### **Marketing**

- 5.23 The passport ticketing system at the Ironbridge Gorge has been a success for many years and a contributory factor to its success. The sites are differentiated from each other in content and style, as well as being marketed coherently. A similar scheme could help raise the profile of Hadrian's Wall.
- 5.24 The marketing of the Looking for Lincoln project provides an example of how an umbrella marketing approach can help visitors best enjoy the experience, for example, by providing a range of suggested itineraries.
- 5.25 By contrast, there was no separate marketing apparatus for the Chateaux of the Loire, which are promoted by the regional tourism office.

### **Co-ordination of Visitor Experience**

- 5.26 The Looking for Lincoln (LFL) project is a good example of the benefits of taking a co-ordinated approach to the development of the visitor experience. By providing support and guidance, LFL has been able to steer the development of the creative concepts for each new site, ensuring that they tell a unique aspect of the Lincoln story, whilst remaining linked through the LFL brand. Financial support and expert advice on the development of wider visitor services has also helped ensure buy-in to the project from the communities involved.
- 5.27 Similarly, the differentiation of the sites at Ironbridge Gorge is an example of how Hadrian's Wall sites working more closely together on developments could provide a considered overall visitor experience.
- 5.28 This approach was not in place in the Illinois & Michigan Canal National Heritage Corridor, which has led to a lack of balance in the geographic distribution of the sites.

### **Visitor and Traffic Management**

- 5.29 The park-and-ride scheme at Bru Na Boinne has been a useful comparable for the Haltwhistle Hub. The introduction of the Bru Na Boinne Visitor Centre has been successful in managing the visitor flow around the Newgrange Neolithic monument and in addressing issues such as traffic congestion and parking at the monument, helping prevent further wear and tear to the monument.
- 5.30 Attendance levels at Newgrange itself have been artificially reduced by limiting the number of tours available to take visitors around the site, a situation which is not envisaged to be necessary for any of the existing Hadrian's Wall sites. Despite this limitation, the Bru na Boinne site as a whole has seen growth in attendance levels since the opening of the visitor centre.

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## **6. THE VISION**

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### ***INTRODUCTION***

- 6.1 There is 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. This Vision should become the central guide for all the partners that have ownership of some or all of the visitor interaction with Hadrian's Wall.
- 6.2 In order to deliver such a Vision the consultant team followed an established process evolved and led by branding specialists, Brand Vista. The process involved three stages:
- A one and a half day Visioning programme to develop a draft Vision.
  - Testing of the draft Vision amongst consumers and stakeholders.
  - The development of a final Vision based on test findings.

### ***VISIONING PROGRAMME***

- 6.3 Research conducted amongst current and potential visitors during the fact finding phase of the Major Study established the current standing of Hadrian's Wall and provided stimulus for the strategic development of the Vision.
- 6.4 Further stimulus was provided through the consultations with key stakeholders in Hadrian's Wall and a review of the existing sites and attractions along the Wall. The information derived from these activities was then set in the wider context of brand and tourism trends in order to inform and support the Visioning programme.
- 6.5 These findings were pulled together into a briefing paper, issued in advance to a team of stakeholders and members of the consultant team participating in the one and a half day Visioning programme.
- 6.6 A team of seven was selected by the two RDAs to represent the wider stakeholders during the Visioning programme. Figure 6.1 sets out the selected representatives.
- 6.7 Brian Irving was unable to attend. Also present at the Visioning workshop were seven members of the consultant team. The Visioning programme was run by Gary Moss of Brand Vista.

**FIGURE 6.1**

**STAKEHOLDER REPRESENTATIVES ON VISIONING PROGRAMME**

<b>Representative</b>	<b>Stakeholder Organisation</b>
Phil Reddy	NWDA
John Sargent	ONE Northeast
Anita Thornberry	ONE Northeast
Graham Taylor	NNPA
Harriet Sykes	CTB and Talkin Head
Jane Brantom	HWTP
Brian Irving	Solway AONB

*Source: NWDA & ONE NorthEast*

6.8 The objective of the one and a half day programme was to develop a clear and motivating Vision for the future. The key requirements of the new Vision for Hadrian’s Wall were that it must:

- Be broad enough to encompass any forthcoming changes.
- Be broad enough to attract a wide audience of both current and future visitors and the many partners of the Wall.
- Forge an emotional connection with visitors and partners; as such connections are stronger and less easily replicated.
- Build on the past.
- Have a positioning ambition that is a big leap forward, a big ‘brand’ goal.
- Be understandable, unambiguous and useful, even to the newest recruit.
- Be a guide for the 1000s of small gestures that will build Hadrian’s Wall.
- Provide a guide for future developments.
- Most importantly, it must differentiate.

6.9 It was also important that the new Vision for Hadrian’s Wall was not:

- Over intellectualised, or just a nice set of words that never gets used.

***Visioning Programme Briefing Paper***

6.10 The full briefing paper is set out in Appendix 4. Key issues that were identified in the briefing paper are shown below.

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## **Emergent Brand Trends for Consideration**

6.11 The needs and desires of consumers do not stand still and there are four emergent strategic trends that we have seen evolving in this market place over recent years which could develop into key motivators of the future.

- **Authenticity:** Organisations or brands that are the original in a given market.
- **Community:** Organisations or brands that develop a sense of a genuine community feeling.
- **Honesty:** Organisations or brands that are open with their customers.
- **Fairness:** Organisations or brands that deliver good value for money and are seen to be fair to their consumers and stakeholders (including employees, partners and local community) in the widest sense.

## **Hadrian's Wall Context**

6.12 The fact finding phase of the Major Study identified the following key issues for Hadrian's Wall.

- There is confusion and a lack of clarity as to what Hadrian's Wall actually is, and little view on its role or gravitas as a World Heritage Site.
- Hadrian's Wall is seen as a regional monument and not a national, let alone a global, one.
- There is a significant lack of awareness about the Wall and what it represents.
- The Hadrian's Wall experience is highly fragmented and diluted for the visiting public.
- In a highly competitive market Hadrian's Wall does not have a clear and differentiated position in people's minds.
- The Wall is managed in a fragmented fashion with no clear and co-ordinating strategic view of the future.
- There is limited synergy between the partners delivering Hadrian's Wall to visitors, making the establishment of a clear and differentiating Vision a complex challenge.
- The wall exists in a fragile environment and this will need to be managed alongside the development of tourist numbers.

## **Hadrian's Wall Current Standing**

6.13 The consumer research conducted amongst both current visitors to the Wall and lapsed and non-visitors provided the following input to the Visioning process.

- Limited awareness outside the immediate geography of the Wall limits the appeal to potential visitors. For locals it is a reminder of school visits and for non-visitors 'it's just a wall'.

- The lack of context and understanding of its history means that it is often seen as a place for specialists and a duty visit rather than a must see once in a lifetime experience.
- There is no real emotional or rational focal point for the Wall and this is re-enforced on visiting.
- The National Trail is seen as a good starting point to put Hadrian's Wall on the map.
- Visitor expectations are low and they rate the experience as good rather than excellent.
- The unspoilt and remote nature is a motivator for the local community and current visitors but the remoteness alienates non-visitors.
- The world importance of the site is negatively impacted by its low general awareness; something of worldwide importance should by definition have high awareness.

### ***Draft Vision***

- 6.14 The full outputs from the one and a half day Visioning programme are set out in Appendix 5. The draft Vision that emerged from the programme is shown below.

### **Audacious Goal**

- 6.15 To move Hadrian's Wall from a National (Northern) 'ought to see' to a Global 'must stay and return for more'.

### **Positioning**

- 6.16 'From Hadrian to Here (now) – A world-class cultural journey through stunning landscapes'

### **Personality (the way in which we do it)**

#### *Authentic*

- 6.17 Hadrian's Wall and the whole WHS is a unique environment and monument to the Romans and their achievements. It is the largest and most enduring sign of the frontier of the Empire they created and it has been an integral and evolving part of our landscape ever since. It is being preserved for the world as a historic global heritage asset.

#### *Welcoming*

- 6.18 Everybody connected to Hadrian's Wall understands their unique place in history, helping to preserve and protect the WHS. They also understand that nothing remains the same and they make sure that not only are visitors welcomed, but they will also have an enjoyable time exploring the centuries of history that have gone into making this site unique. The combination of the unique history and the stunning landscapes make for a truly rewarding visit.

## Captivating

- 6.19 The sheer depth and range of cultural stimulus contained in the WHS can capture the imagination of even the most disinterested visitor, from the challenging landscapes to the intrigue of the historical facts (and fiction). This is an area where the more you put into it the more you get out. All the senses are stimulated during a visit to the area and the visitor is helped to get the best out of the experience wherever they come into contact with the WHS.

## Audacious

- 6.20 Just as Hadrian's original plan to build the Wall was an audacious move, so is the way in which the current custodians keep it top of people's minds. The ambitions of the custodians are to keep the WHS relevant to a wide range of visitors and know that they have a responsibility to entertain as well as inform. Visitors will leave inspired and with some of the passion displayed by the Hadrian's Wall team and sites.

## **TESTING THE DRAFT VISION**

### ***Steering Group Meeting***

- 6.21 The draft Vision was presented at the July Steering Group Meeting, together with a proposal for testing the draft Vision amongst consumers and key stakeholders. The Steering Group felt that Hadrian's Wall did not currently have National 'ought to see status' and so requested that the wording of the audacious goal be amended, from 'a National ought to see' to 'a Northern ought to see'. With this one amendment, the draft Vision was agreed to be ready for testing.

### ***Stakeholder Workshops***

#### **Introduction**

- 6.22 A series of eight workshops were set up to enable the draft Vision to be tested amongst key stakeholders. The aim of the workshops was to get feedback from the stakeholders on the appropriateness of the elements of the Vision, the audacious goal, the positioning and the personality, and, importantly, to debate with the stakeholders the implications of implementing the draft Vision on organisation, the visitor offer and infrastructure. This debate would then provide important insight to support the development of a strategy to implement the Vision.
- 6.23 Participants in the workshops were selected by members of the Steering Group, building on an initial list drawn up from stakeholders involved in the fact finding consultation phase. A full list of participants, together with the outputs of the Visioning workshops, is set out in Appendix 6. In total, 47 stakeholders attended the workshops, from the list of 68 stakeholders originally invited.

- 6.24 Four workshops were held in Newcastle, two in Penrith and two in Carlisle. Each workshop was facilitated by two members of the consultant team.

### **Summary of Feedback from Stakeholder Workshops**

#### *Draft Audacious Goal*

- 6.25 It was felt to be important to be audacious in setting the goal for Hadrian's Wall and to aim high, as long as everyone was realistic about the extent to which the infrastructure and the visitor experience would need to change to deliver the goal, and the length of time that it would take to achieve the goal.
- 6.26 The stakeholders suggested that the goal be adjusted from "...a global must stay and return for more" to "...a global must see, stay and return for more". This adjustment was felt to be necessary to reflect the importance of both day visits and overnight stays in driving incremental tourism revenues to the regions.

#### *Draft Positioning*

- 6.27 The Frontier concept was very popular as it was felt to encompass both the line of the Wall and the West Cumbria coast. Both the Sea and the Wall were seen to be physical frontiers, the landscape was seen to be a natural frontier and the concept also evoked the role of the Wall and the coast as a trading frontier.
- 6.28 There were concerns that Hadrian is not a well known name outside the UK. Roman was felt to be a better reference, either as an alternative to Hadrian, or to re-enforce Hadrian.
- 6.29 The draft positioning statement was felt to consist of four elements, history, quality, geography and a driver (inspiration). Each of these elements had its champions and its detractors. There was no consensus of opinion on how the draft positioning might be taken forward, reflecting the overly complex nature of the statement.

#### *Draft Personality*

- 6.30 Generally, the four personality traits were accepted by the stakeholders. The word authentic generated some debate as to whether this could apply to the visitor experience. There was concern that all interpretation is based on theories not fact and so could not be described as authentic. However, it was agreed that authentic should be interpreted as 'rooted in truth' and that developments such as reconstruction would be acceptable, as long as visitors were told that they were based on theories not fact.

## **Consumer Testing**

### **Introduction**

- 6.31 Ten focus groups were conducted in August 2003, with two groups held at each of five selected locations in England and Scotland. The groups in Manchester, Birmingham, London and Glasgow were segmented by life stage and socio-

economic class. The groups in Newcastle were divided into one group of recent visitors to Hadrian's Wall and one group of lapsed and non-visitors to Hadrian's Wall.

- 6.32 The draft positioning statement that emerged from the original one and a half day Visioning programme incorporated a number of aspects of the Hadrian's Wall experience. In order to test the various components of this statement, and to determine which elements were the most motivating, it was broken down into five shorter and more focused positioning statements.
- 6.33 Each of these five positioning statements was shown to the participants of the focus groups. The statements were initially presented without the context of Hadrian's Wall and respondents were asked to say what image the positioning conjured up for them. The five statements were:
- One of the world's greatest historical landscapes.
  - A world class cultural journey through stunning landscapes.
  - The only coast to coast World Heritage Site in the world.
  - The greatest cultural journey from Roman times to the present day.
  - The Greatest Roman frontier in Europe.
- 6.34 Respondents were then asked about their perceptions of Hadrian's Wall and what, if any, impact the positioning statements had had on those perceptions. They were also asked about visiting the Wall, either for short breaks or days out.

### **Findings from Consumer Testing**

- 6.35 The full findings are set out in Appendix 7. A summary of the key findings is given below.

#### *Response to Positioning Statements*

##### One of the World's Greatest Historical Landscapes

- 6.36 This statement was generally understood to relate to a landscape on which people have had an impact. The greatest implies well known, big and impressive such as the Great Wall of China, Pyramids, or Stonehenge. However, it can also relate to sites of significant events, notably battles, where there is little to see now, but the site has major historical importance. The concept would be appropriate for Hadrian's Wall, but left respondents with feelings that people might be disappointed by what remains to be seen. The statement 'Greatest historical landscape' therefore might be seen to be an exaggeration.

##### A World Class Cultural Journey Through Stunning Landscapes

- 6.37 This immediately evoked images of travel, with 'world class' suggesting high class travel – Orient Express, cruise up the Nile, Concorde. Cultural journey was interpreted in one of two ways: it was either seen as highbrow and not for the non-culture lovers; or as cultural in an anthropological sense, implying foreign travel. Stunning landscapes were seen to have a major 'wow' factor –

mountains, lakes, rugged coast. This positioning was not seen to fit well with Hadrian's Wall. In the narrow sense of culture, there were concerns whether what there is to see is interesting enough, and in the wider sense, it is not about seeing how different cultures live. Views of the Hadrian's Wall landscape differed considerably, some felt that parts of it were indeed stunning, but amongst others it was seen to be a bit flat and samey.

#### The Only Coast to Coast World Heritage Site in the World

- 6.38 Coast to coast was not necessarily seen as a benefit; it may be unique but it does not make it a special place to visit. It also implied the need to cover the whole length and thus suggests that it is for walkers. World Heritage Site is not a well known concept. It suggested something worth preserving, in need of protection, but not necessarily something that would be exciting to look at. However, it was seen as providing a quality mark. It was seen as fitting that Hadrian's Wall should be a WHS, however being a WHS did not convince respondents that it would be any more interesting to visit. Coast to coast in connection to Hadrian's Wall tended to reinforce perceptions of somewhere for keen walkers. There were also objections that Hadrian's Wall no longer does span coast to coast.

#### The Greatest Cultural Journey from Roman Times to the Present Day

- 6.39 This positioning conveyed a journey through time and immediately suggested Roman cities, such as Chester, Bath and York, where evidence of the past at different periods can be seen. As a secondary meaning, it could suggest a physical journey where you would see evidence of different periods in the past. The positioning was not felt to be appropriate to Hadrian's Wall as nothing much was perceived to have happened there since Roman times.

#### The Greatest Roman Frontier in Europe

- 6.40 This strongly suggested Hadrian's Wall, which was perceived to be the only Roman frontier where there is anything to be seen. It suggested that there must be something, maybe quite a lot, to see there. Romans aroused varying degrees of interest; with the key problem with 'Roman' in Britain being that what is left to see is not spectacular. In contrast, the strong influence of television and film means that people could picture Romans in places such as the Coliseum and Pompeii. The positioning was perceived to be accurate for Hadrian's Wall. The degree to which it was also motivating depended on imaginative elements being added, such as images of life on the Wall.

#### Current Image of Hadrian's Wall

- 6.41 When respondents were asked for their current perceptions of Hadrian's Wall the replies were consistent with the other consumer research conducted during the study. Hadrian's Wall was seen as being built for a single purpose and linked to a single period, with no perceptions of it having played any role in history once the Romans had left.

- 6.42 Respondents felt that there was little to see there, with prior knowledge and imagination required to interpret the experience. However, there was a feeling that Hadrian's Wall could be fascinating if it was interpreted properly ("in the way the Romans are presented on TV").
- 6.43 Respondents were asked what the Roman period represented to them. All of them had a clear image of Romans, based largely of fictional representations in films and factual television programmes. The period was seen to be an interesting one (described as "bigger, better, more extreme for the time"), for their achievements in conquering large parts of the world and for the Roman way of life. The respondents in England also had a strong sense of ownership of 'local' Romans. Amongst the Glasgow group this was not the case, with Hadrian's Wall seen as having been built to "keep them out".
- 6.44 Bringing the Roman stories to life, how they lived on the Wall, how they built the Wall, their impact on local people, the personalities involved etc was seen to have potential appeal for a range of visitors.

## ***DEVELOPMENT OF AGREED VISION***

### ***Introduction***

- 6.45 The findings from the stakeholder workshops and consumer testing were fed into a one day consultants positioning brainstorm. The main focus of the brainstorm was to develop a motivating positioning statement. The audacious goal had tested well with the stakeholders, with the adjustment to reflect the importance of day as well as stay visitors. Similarly, the personality had been agreed by the stakeholders, without any changes required, other than the requirement that authentic should be interpreted as 'rooted in truth'.

### ***Evolving the Positioning***

- 6.46 In order to evolve the positioning for Hadrian's Wall, the brainstorm session focused on six key requirements for a successful positioning:
- Motivating.
  - Differentiating.
  - Clear.
  - Focused.
  - Visionary but achievable.
  - Based in fact not fantasy.
- 6.47 Each of the positioning statements tested in the consumer research was reviewed against these six requirements. They were also assessed to determine their ability to make a step change for Hadrian's Wall, capable of achieving the audacious goal. The findings of this review, together with the stakeholder feedback and the consumer testing led to the unanimous view that the positioning for Hadrian's Wall should be the 'Greatest Roman Frontier'.

- 6.48 In addition to testing well with consumers and addressing the scope of the Major Study requirement for the stakeholders, the 'Greatest Roman Frontier' is highly focused and unambiguous. It builds on the natural strengths of Hadrian's Wall and provides a catalyst for creativity to guide the future development of the visitor experience. Importantly, it differentiates Hadrian's Wall from the plethora of alternative leisure messages and is totally rooted in truth.
- 6.49 The findings of the testing of the Vision and the consultants' recommendations for the Vision were presented to and agreed by the October Steering Group meeting and are set out below.

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

***IMPLICATIONS OF THE VISION ON ORGANISATION***

- 6.50 The Vision identified above for Hadrian's Wall is, rightly, an ambitious one. It is, by definition, more customer-focused than any previous Vision to date. To realise this Vision within such a large and diverse heritage attraction such as Hadrian's Wall will involve a distinct challenge and considerable investment.
- 6.51 It is unlikely that any existing organisation is capable of meeting this challenge or winning sufficient confidence with future funding bodies to attract the necessary levels of investment. Hadrian's Wall therefore needs a new organisation, suitably constructed to meet such a challenge, capable of directing proper levels of investment effectively and, thereby, also capable of inspiring confidence in its future capacity to realise the Wall's full potential.
- 6.52 As with many cultural bodies, especially in the performance arts, the role of this new organisation will be similar to that of a director of a theatre company or film production. It cannot aspire to being a dictator. It will not be able to control the full Hadrian's Wall 'cast' itself. There will be many 'actors' of considerable experience, skill and personality, through whom it will have to work to deliver the overall production.
- 6.53 As with many actor/directors, it may at times and in places become a cast member itself, especially through the possible operation of the proposed new

developments on the Wall where it should be able to lead by example. However, it should always be capable of commanding respect amongst all cast members; communicating to them an understanding of the aim of the whole production and its future relationship with the likely audience – the basis of any long-term future sustainability – and successfully defining the roles required of all participants in the production in order to ensure the delivery of a high quality product.

- 6.54 Unlike theatre or film productions, whose Vision is capable of being relatively quickly realised, the Vision for Hadrian's Wall is likely to take some time. Any new organisation for the Wall is therefore likely to require commitment, stamina and persistence to succeed, and needs to be given effective support from the outset to ensure its longevity and minimise any tendencies to undermine its authority over time.

### ***IMPLICATIONS OF THE VISION ON VISITOR EXPERIENCE***

- 6.55 The complex layout of Hadrian's Wall presents three major challenges for creating a cohesive visitor experience that can deliver on the 'Greatest Roman Frontier' Vision.
- 6.56 Firstly, Hadrian's Wall is physically long and varied along its length. It crosses through several regions and through coastal, rural and urban landscape. As a result, its heritage assets span a very large area. Main visitor sites are geographically disconnected from each other, limiting the potential for guests to visit multiple sites.
- 6.57 Secondly, the main Roman sites along its line are owned and operated by different organisations. Each has a unique presentation style and quality of interpretation. Also, there is a degree of perceived competition between the sites and a general emphasis on site-specific aims that could conflict with the more integrated approach required to successfully implement the 'Greatest Roman Frontier' Vision.
- 6.58 Finally, Hadrian's Wall is fragmented and has weak linkages between the main Roman sites. This makes it difficult to consistently communicate all that Hadrian's Wall has to offer its visitors. It seems there may be an existing assumption that visitors arrive with certain prior knowledge about the sites - how the sites connect to each other, how they connect to the Wall itself, its history, etc. As a result, visitors without this knowledge might never learn about these elements. This may limit their ability to successfully differentiate between individual sites, a factor which is important for promoting multiple site visits. Also, because Hadrian's Wall was a military construction, it was subject to formulaic Roman designs. To a casual observer it may appear that these sites are all the same or similar, which is incorrect. This perception may also decrease multiple site visits.

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## ***IMPLICATIONS OF THE VISION ON TOURISM INFRASTRUCTURE***

- 6.59 Throughout the consultation process a recurring theme has been concern that there will not be sufficient infrastructure to accommodate increased visitor interest in Hadrian's Wall. In these discussions the definition of infrastructure is not just the conventional one of road and rail capacity, but rather specific tourism infrastructure, much of which is typically delivered, or not, by the private sector. The areas of infrastructure under discussion here are:
- Accommodation of all types and price points. In particular, the serviced sector, in the form of more quality hotels, guesthouses and B&Bs, hostels for organised groups, campsites for some of the walkers, and hotels large enough to accommodate coach parties.
  - The lack of availability of shops, food and beverage outlets and petrol stations generally, and the fact that those that exist do not always trade at hours convenient to tourists.
  - The lack of range, and in particular of quality, in the retail and catering sectors.
  - Toilets available for public use.
  - Car parking capacity conveniently located for visitors.
- 6.60 While this issue has been outside the terms of reference for the study it does present a potential negative influence which could impact the outcome of the Major Study. The recommendations of the Major Study are projected to grow the number of visitors to the regions, As these projections become reality, there could not only be frustrated demand for accommodation, but also dissatisfaction among visitors who expect a range of choice and availability of shops, cafes and restaurants.
- 6.61 Further evidence of this likely problem emerged when Northumberland County Council made available the Visitor Satisfaction Survey findings for its Market Towns Initiative, which included two market towns within the Hadrian's Wall corridor. The survey showed that visitor satisfaction with the range and availability of attractions, food-service outlets and shops was distinctly lower than visitor satisfaction with accommodation.
- 6.62 The implication of these findings is that all agencies involved in the development of tourism to Hadrian's Wall need to address the issue of supporting infrastructure in parallel with the proposed Major Study development plan for the Wall. It will be particularly important for them to work with private sector providers of accommodation and other supporting services, to build the private sector's awareness of the potential economic benefits of investing in their product and staffing levels.
- 6.63 In Northumberland, the NSP has recognised the possibility of an imbalance of supply and demand should the popularity of Hadrian's Wall rise as dramatically as was their experience with Alnwick Gardens in 2003. It has commissioned a study to identify areas of priority for public sector interventions in support of tourism. The draft findings of the study have recently been presented in a

report titled 'Priorities for public sector funding of Northumberland tourist: Interim Report'.

- 6.64 It may be necessary for the equivalent agencies to perform a similar exercise to address such issues in Cumbria. This subject was raised at the public consultation on 18th February 2004.

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## **7. STRATEGIC OBJECTIVES**

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### ***INTRODUCTION***

- 7.1 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. The aim is to achieve this within the framework of the second Hadrian's Wall Management Plan (2002 to 2007).
- 7.2 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 Tynside section, the central section and the West Cumbria section).
- 7.3 To date the focus of Hadrian's Wall development and communication has been mainly within the North East Regional Development Agency area. Even within the North East the main focus has been on the Central Section of the WHS. 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.
- 7.4 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.
- 7.5 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 focused 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 current coastal excavations and Hadrian's Wall is largely limited to Roman specialists.
- 7.6 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.
- 7.7 The urban Tyne and Wear section includes two popular visitor sites, Segedunum and Arbeia, together with the less well visited Museum of Antiquities. Currently the majority of visits to the sites are from local residents and schools. 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.
- 7.8 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.

## **KEY AREAS**

- 7.9 There are a number of key aspects that need addressing in order to establish Hadrian's Wall as the "Greatest Roman Frontier".

### ***Organisational Structure***

- 7.10 The fact finding stage of the Major Study identified issues with the current organisational structure, which the consultant team believes constrain the ability of Hadrian's Wall to contribute to the economies of the North of England.
- 7.11 Before Hadrian's Wall can move forward there is the need to create a new organisational structure to address these issues and allow the establishment of the 'Greatest Roman Frontier'. For this organisation to be successful, it will require buy-in from the stakeholders. Details of the recommended organisational strategy are set out in Section 8.

### ***Visitor Experience***

- 7.12 The fact finding stage also identified issues with the current visitor experience. The consultant team recommends investment in the visitor offer in order to address these issues and to create, through sustainable development, a product that can deliver the promise of the 'Greatest Roman Frontier'. The recommended development plan is set out under Interpretation and Product Development Strategy in Section 9.
- 7.13 In addition to aspects of the visitor experience covered by the development plan, there is also a need to review the supporting tourism infrastructure, as set out earlier in Section 6. It is expected that this would be largely brought about by secondary investment on the part of the private sector. However, given the depressed state of the tourism sector in the rural areas of Tynedale, Eden District, the rural parts of Carlisle District and the West Cumbria coast, it may be necessary for the relevant agencies to develop an intervention strategy to stimulate such development.

### ***Communication***

- 7.14 A number of negative associations with Hadrian's Wall were identified during the fact finding stage. The role of the communication strategy will be to address these negatives through raising awareness and establishing the more motivating imagery associated with the 'Greatest Roman Frontier'. Whilst the detail of the communications strategy will be developed post the Major Study, the key strategic requirements are set out under Marketing and Communications Strategy in Section 10.

### ***Economic Regeneration***

- 7.15 As the key objective of the Major Study is to grow tourism revenues to the North of England, it is critical that the recommendations of the Major Study do indeed bring an economic benefit to both the North West and the North East. The

ability to achieve this has been modelled through an Economic Impact Assessment. A summary of the findings of this are set out under Economic Impact of Strategy in Section 11 and the full report is provided as Appendix 9.

### ***Broader Impact of Major Study Strategy***

- 7.16 The growth objectives of the Major Study have to be achieved in a sustainable manner. The ability to achieve this has been reviewed through separate assessments on the impact of the strategy on the operation of the Hadrian's Wall WHS, the community, the environment within the WHS and transport issues relating to the WHS. A summary of the findings of these assessments is set out in Section 12 and the full reports on the environment and transport assessments are provided as Appendices 10 and 11.

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## 8. ORGANISATIONAL STRATEGY

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### *INTRODUCTION*

8.1 The fact finding stage of the Major Study identified issues with the current organisational structure, which the consultant team believes constrain the ability of Hadrian's Wall to contribute to the economies of the North of England. Full details of the recommended organisational strategy are set out in Appendix 8. A summary of the findings is provided below.

### *STRATEGIC REQUIREMENTS*

8.2 The primary role of any new organisation for Hadrian's Wall is to become the responsible body for delivering the Vision. The new Vision is by definition all encompassing, therefore the new organisation needs to be capable of addressing all activities that concern the delivery of this Vision.

8.3 In order to ensure a high quality experience such an organisation needs to have a capability that encompasses:

- The effective conservation of the Wall and its setting.
- Ongoing archaeological research into the Wall.
- The future product development along the whole of the Wall.
- It's marketing locally, regionally, nationally and internationally.
- The proper management of its visitors on the ground.

8.4 Thus there needs to be few restrictions on its capacity to intervene on behalf of the Wall as a whole and the agreed Vision for it. It needs to be a heritage tourism organisation with real national clout.

### *Conservation, Heritage and Environmental Management*

8.5 There will always be conflicts within heritage attractions between conservation and tourism needs. These have to be resolved within the new organisation rather than become a battle between organisations. Thus the new organisation should subsume the current Hadrian's Wall Co-ordination Unit and become responsible for implementing the current WHS Management Plan and producing updates to this Plan in the future.

### *Archaeological and Historical Research Co-ordination*

8.6 Most of the stories associated with Hadrian's Wall come from research of the Wall itself and its various sites. It would seem that there is currently little planning of this research or prioritising of sites/areas of research with definite goals in mind. Certain sites seem to incur a lot of archaeological activity (e.g. Vindolanda and Arbeia) and others, to-date, very little, if any (e.g. the western end of the Wall).

- 8.7 An explicit Wall-wide research programme needs to be developed and properly funded, so everyone can appreciate the priorities and react to them accordingly. This presumably is an activity within the WHS Management Plan and should be included in the responsibilities of the new organisation.

### ***Co-ordination of All Interpretation and Education***

- 8.8 Closely related to the archaeological and historical research functions are those of interpretation and education. As will be argued more cogently in Section 9 there needs to be an overall Wall-wide interpretation and content strategy that co-ordinates all the various sites along the Wall, and differentiates each from the other to allow visitors a reason to visit more than one site. A panel consisting of Hadrian's Wall historians, site curators and archaeologists, as well as attraction designers and interpretation experts, is recommended to develop the details for each site within the context of the Wall-wide interpretation and content strategy. This panel, we suggest, should be an extension of the responsibilities of the new organisation (i.e. an advisory group to the Board of the new organisation).

### ***Development of the Product***

- 8.9 This is a crucial function of the new organisation as it is likely to involve considerable new capital investment. Much of the development will ultimately be determined by the future interpretation strategy which will identify both potential areas of improvement and possible gaps in the Wall's storylines that need to be filled.
- 8.10 However, development will also be generated from the need to handle visitors better along the length of the Wall and introduce potential new elements of the Wall particularly those in the West (see Section 9). Such development is likely to involve the acquisition of new land and property. Co-ordination of the allocation of this investment within an overall programme is a key task for effectively realising the new Vision.

### ***Visitor Management***

- 8.11 Visitor management covers aspects such as site operation and management. How the co-ordination of visitor management between the various sites along the Wall is achieved is going to be a critical issue for improving the visitor experience generally. Visitors are not that interested in who is in charge of which site, but they are interested in the quality of the visitor experience, which requires competent management.
- 8.12 Establishing a common approach for quality control across the whole Wall is therefore likely to be another essential role for the new organisation. Joint ticketing is a vital service for such a disparate group of attractions that will offer visitors a real improvement to the experience of their visit to the Wall generally and almost instantly it is introduced. This can only be administered centrally by the new organisation with the agreement of all participating site operators.

### ***Infrastructure Development***

- 8.13 This is mainly to do with transportation, which is a key issue for an attraction of some 80 miles long and which is mainly located in remote and wild areas of northern England. Establishing an effective 'park and ride' system in places of high density demand is an obvious opportunity to prevent an environmentally catastrophic and anarchic private car free-for-all across the moors. This can only be managed and operated centrally as another duty of the new organisation in agreement with local site operators (see Transport Assessment in Section 12).
- 8.14 However, such a large attraction should stimulate other tourism infrastructure development such as new retail and catering provision offering a wider range of services and quality new hotels to encourage visitors to stay longer in the area for everyone's benefit. There should be real possibilities for the new organisation to work with the relevant agencies to encourage, and possibly enable, such developments as part of its wider development programme.

### ***Marketing***

- 8.15 There is already valuable experience of the central marketing function being carried out by HWTP. This is a real opportunity for the new organisation to expand and develop at every level - local, regional, national and international - to ensure that Hadrian's Wall's new Vision is effectively appreciated by more visitors, spending more money in the area. The good website already instigated by the HWTP could be developed further by the new organisation as an effective marketing tool to include, for instance, online remote ticketing and booking facilities.

### ***Quality Control***

- 8.16 Establishing quality benchmarks for overall building design and interpretation design, retail products and services, catering products and services, staff training and customer care will be an important role for the new organisation. Such quality control should help individual site operators to compete on a level playing field and protect the Hadrian's Wall brand from being debased by unacceptable low quality products and services. This might involve the operation of a centrally administered licensing system of some sort.

### ***Summary***

- 8.17 As can be seen from the above that the potential role for the new organisation is a huge one. It will never be able to do everything itself or do everything at once but its potential influence is enormous. It should be given the powers and resources to deliver this potential and there are existing models of how this might best be achieved.
- 8.18 Much of the new organisation's necessary areas of intervention will have an impact on the revenues of each of the individual sites – the aim of the Major Study being that this should be a positive impact. Thus for the first time at Hadrian's Wall there would be a central influence and co-ordination over each

site's content, through the interpretation co-ordinating group, and the delivery of its visitors through both the provision of overall visitor services, and the joint marketing and ticketing activities. It may therefore be necessary for the new organisation to negotiate service level agreements with each independent site for minimum annual revenues to be achieved at that site, based, possibly, on their existing performance.

## ***RECOMMENDED NEW ORGANISATION STRUCTURE***

8.19 There are two broad strategic options for the structure of the new organisation; statutory and non-statutory.

8.20 Examples of statutory organisations that might be relevant are:

- The Development Corporation model as demonstrated by the New Town and Urban Development Corporations (and more recently the Deputy Prime Minister's proposals for the east of London, Thames estuary development).
- The National Park Authority model.
- A new 'Heritage Park' model.

8.21 Examples of non-statutory organisations that might be relevant are:

- Voluntary association or partnership.
- Limited Liability Partnership.
- Not-for-profit Company (Company Limited by Guarantee with shareholders liability limited to £1 – viz. Network Rail).
- Not-for-profit Company (Company Limited by Guarantee) with charitable status.
- Community Interest Company (CIC) – a new private company concept under consideration by the DTI that locks in any assets of the company to prevent asset stripping by future purchasers of the company.

8.22 We undertook an analysis of the advantages and disadvantages of each of the above examples (see Appendix 8). Given the fact that statutory models would need to define a physical boundary and thus take considerable time to effect (involving, as they must, parliamentary procedures and so on), CICs are not yet in use and Partnerships have not had a good track record at Hadrian's Wall to date because of the numbers of partners necessarily involved, the consultant teams' view is that a new not-for-profit company with charitable status would be the most appropriate to fulfil the role of the new organisation for the whole Wall as identified above.

8.23 In the future, and only if necessary, this new organisation might need to evolve into a statutory body with additional legal powers as required. It is suggested that this new organisation might simply be called The Hadrian's Wall Trust (HWT) for the present.

8.24 As a company limited by guarantee (i.e. a not-for-profit company) with intended charitable status, HWT could be formed by a membership of interested parties

(the equivalent in a private company of shareholders but whose shares in this case are limited by guarantee to usually £1).

- 8.25 The main duty of the members of HWT will be to elect a suitable and effective HWT Board of Directors on a system agreed when HWT is formed, in its Articles of Association. The Directors themselves do not need to be direct representatives of the members and, under company law, will have duties and responsibilities first to HWT, with a requirement to declare any conflict of interest if any may arise.
- 8.26 The on-going role of the members of HWT will be to ensure that the Board of Directors continues to be a suitable and effective Board over time, based upon their relevant skills, experience and, ultimately, performance in meeting the objects defined in HWT's Memorandum of Association, which will need to be agreed when HWT is formed.
- 8.27 The composition of the members of HWT needs to be limited in number to the future main 'power brokers' of the project in terms of: their potential funding role; their heritage, conservation and tourism credentials; and in ensuring that the key political interests along the Wall are represented.
- 8.28 As 'guardians' of the Major Study, once it has been approved, as well as through their crucial future funding role, the two RDA's (ONE NorthEast and NWDA) will naturally become a major influence on the successful progress of the project and accordingly will need to play a large part in the effective establishment of HWT, as two of its founding members.
- 8.29 The charitable objects of HWT would be likely to involve two strands:
- The preservation of sites, buildings, structures, remains and artefacts of national interest or architectural or historic interest or historically associated with Hadrian's Wall in the North of England and the protection, augmentation and enhancement of the amenities of such sites, buildings, structures, remains and artefacts and their surroundings for the public benefit.
  - Access to and enjoyment by the public of Hadrian's Wall, the 'Greatest Roman Frontier', for the purposes of education into British Roman history and other matters related to the history of the Wall since its original construction.
- 8.30 The key role of The HWT will be a conservation/developmental one, but as indicated above there are major operational and marketing issues that will need to be addressed centrally. This can be done in one of two ways, either as a private trading company or as a not-for-profit company. Further details of these options are set out below:

### ***Private Trading Company***

- 8.31 The HWT sets up a wholly-owned private trading company, for example, The 'Greatest Roman Frontier' Ltd. (GRFL) to operate a joint marketing and ticketing service (including an overall website). It could also operate an overall

educational and event management service by agreement. It may also become involved with the visitor management of various sites - particularly the proposed new developments (see Section 9).

- 8.32 This body would also operate any transport infrastructure related directly to the Wall. All annual surpluses created from its operational activities would then be distributed by covenant or gift aid tax-free to the HWT and any other partner it is working for under contract (e.g. through the centralised ticketing service).

### ***Not-for-Profit Company***

- 8.33 A separate not-for-profit company is formed, again for example, The 'Greatest Roman Frontier' Ltd. (GRFL). This would operate a joint marketing, ticketing and maybe education and event management service on behalf of all of its 'members' which would include HWT and all the other independent site owner/operators along the length of the Wall. These members would elect a Chairman and Board of Directors to act on their behalf. GRFL too, might become involved with the visitor management of various sites - particularly the proposed new attractions, the story centres and the preview centres.
- 8.34 This body could also operate any transport infrastructure related directly to the Wall. Annual surpluses created over and above its own operational costs would be distributed according to contractually agreed formulae among its members to enable them to operate their individual sites effectively.

## ***RESOURCES AND FUNDING***

- 8.35 As indicated above, the immediate role of the HWT is likely to be a developmental one. Therefore its own initial costs could be covered through the funding of the capital development process in its role acting as the developer of the 'Greatest Roman Frontier'.
- 8.36 This capital development programme 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).
  - English Heritage.
  - National Trust.
  - Regional Single Programme monies through the local strategic partnerships.
  - RDA Central Funds.
  - Local Authorities.
  - Charitable donations.
  - Commercial sponsorship.
- 8.37 It is clear that given the nature of Hadrian's Wall, the vast majority of future capital funding will need to come from the public sector. As a not-for-profit charitable company acting in the public good, the HWT should not have such

funding restricted by State Aid Rules and therefore could even accept 100 percent public funding if this was available. In such a situation ERDF would be expected to contribute at least 25 percent (for any programme up to 2006 only) and maybe more, if available.

- 8.38 Ongoing revenue income is a more difficult issue. Of course, the HWT could earn an income from new developments it has created via GRFL or other operators. GRFL could also earn an income from the delivery of any centralised services provided either direct to visitors or indirectly on behalf of other site operators by contract - such as marketing and ticketing, education, events management, staff training etc. However, it is likely that an on-going operating subsidy will be required.
- 8.39 The cost of ongoing conservation, heritage and environmental management, archaeological and historical research will always be a burden on the HWT. The research functions might earn an income to cover some of their costs through a contractual relationship with a relevant academic institution but there will no doubt be a requirement for ongoing public revenue funding from one or more sources.
- 8.40 Otherwise as a national monument in a unique mainly rural/coastal setting the Wall will probably eventually need to rely on national funding via English Heritage, the Countryside Agency and others – as at present. Only actual experience will determine how much additional visitation expenditure generated from the future activities of the HWT and GRFL can contribute to these costs. With this in mind it would behove the HWT to prepare a Business Plan for the Wall as a whole as soon as possible following its inception.

## 9. INTERPRETATION AND PRODUCT DEVELOPMENT STRATEGY

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### INTRODUCTION

*“Ruins always stimulate the imagination. There is something deeply evocative about them...They make you wonder about the lives, or deaths, of the people who built them, not to mention what such people were striving to create in places that to us, may seem out-of-the-way.”*

*Then & Now, 1991, Stefania Perring & Dominic Perring*

- 9.1 Hadrian’s Wall... these words conjure images of the mighty Roman Empire and its extraordinary people. Over two thousand years ago these talented architects, mason builders, surveyors, carpenters and soldiers used their skills to help expand the Roman Empire by conquering the most remote boundaries of the known western world. Their journey left an indelible mark on the landscape of northern England. It is a timeless monument to these incredible people whose powerful stories still resonate with us today.
- 9.2 With the right strategy we can create a renewed public interest in the rich cultural history that Hadrian’s Wall represents. We can inspire visitors to return in larger numbers than ever before. Our most powerful tool for accomplishing this is story.

### STORY TELLING

- 9.3 People desire educational content that engages not only their minds, but also their hearts and souls. Nothing stirs the soul like a good story. Stories can infuse history with renewed vigour and vitality and add colour to historical facts that might otherwise appear dry or static.
- 9.4 To see the power of story in action, we need only to look at the legacy from which Hadrian’s Wall was conceived – the Roman Empire. The Roman legacy lives in our mythic memory as a result of many rich stories that that have been passed down to us throughout the ages - stories that are intriguing, dramatic and deeply moving. From Julius Caesar’s conquest of Britain to Jesus’ trials during the birth of Christianity, stories from this era form threads that weave the very fabric of our culture today. Their mere mention immediately conjures powerful images in our minds.
- 9.5 Hadrian’s Wall draws from this same mythic reservoir. It is more than just a monument and its physical remains; it is a place that can live vividly in our modern consciousness, given new life through storytelling.
- 9.6 Hadrian’s Wall has a dynamic and compelling story. It is the ‘Greatest Roman Frontier’. Its many forts, mile castles, turrets, hospitals, civilian settlements,

supply bases and bath houses were built and inhabited by not only Roman soldiers, but also women, children, craftsmen and traders. Each brought with them diverse customs, languages and religions. Each joined the common quest to uphold Rome's borders at the farthest edge of the known world.

- 9.7 At its height, Hadrian's Wall was home to a multi-cultural society of many thousands of people. These people had the same basic emotions and desires as we do today. They dealt with similar problems and had similar concerns about work, marriage, love, and civic engagement. The area surrounding Hadrian's Wall was a diverse melting pot of people united by one common goal – to uphold what they considered to be the world's greatest civilising force, the mighty Roman Empire.
- 9.8 The 'Greatest Roman Frontier' story connects us to Hadrian's Wall by reminding us of our common humanity, a universal theme that hasn't changed in more than two thousand years. In fact, the story is still being written with new archaeological discoveries being unearthed daily. These emerging facts shed fresh light on Hadrian's Wall's many mysteries and reveal the true depth of its history.
- 9.9 A visit to Hadrian's Wall can become a vivid and exciting experience for visitors. Its rich history can be dramatised and its ancient residents brought back to life through the application of time-tested story principles. We believe that any successful product development strategy for this attraction must be guided by story.
- 9.10 Examples resonate from around the world of ancient ruins that received an outpouring of public support after stories infused them with new mystery and intrigue. Stonehenge, Easter Island, and the Giza Pyramids are just a few examples of historical sites that live vividly in our modern minds. These sites inspire us to wonder at the ancient people who created them, and to imagine how their lives might have been. These sites are rich with story.
- 9.11 Through the 'Greatest Roman Frontier' story, we believe Hadrian's Wall can generate this same sense of wonder in its guests. A visit to Hadrian's Wall has the potential to be a rich, moving and fascinating story experience that captures visitors' imaginations and taps into their innate sense of curiosity about the past.

## ***RECOMMENDED PRODUCT DEVELOPMENT PLAN***

### ***Strategic Requirements***

- 9.12 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. This theme would also link the Wall's main visitor sites, creating a more cohesive visitor experience and encouraging repeat guest visits.
- 9.13 The current product is very solid and provides a great foundation to build upon. However, by applying the 'Greatest Roman Frontier' positioning, we could create

a more cohesive story-based presentation that would help existing site operators better achieve their goals. Most importantly, this approach would help Hadrian's Wall's stakeholders to strike a better balance between increased visitor attendance and resource protection.

9.14 Before considering our recommendations, we shall visit the criteria that have guided our overall interpretation and product development strategy. These criteria form the conceptual and logistical foundation of our approach. We believe that these criteria must be met in order to effectively implement the 'Greatest Roman Frontier' Vision:

- 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.
- Deliver a more complete big picture perspective on Hadrian's Wall through improved linkages between 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' Vision.

9.15 With these criteria firmly in mind, we believe that Hadrian's Wall could be pulled together to become the 'Greatest Roman Frontier'. To effectively execute this Vision we have devised a strategy that involves providing upgrades to existing attractions and creating several new product components.

9.16 This strategy has been reviewed with the RDA's, the Steering Group and an invited audience of stakeholders. Comments and questions arising from these reviews have been incorporated into the development plan, which is set out below.

### ***Product Development Plan Components***

9.17 To augment existing structures and assist in managing the flow of the visitor experience, we recommend that several components be added. We 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. We also propose three supporting components that would assist with logistical issues and communications.

9.18 The main components are:

- 'Greatest Roman Frontier' Preview Centres to increase public awareness.
- 'Greatest Roman Frontier' Story Centres to complement the existing Hadrian's Wall visitor sites.
- Central Transportation Hub to co-ordinate the flow of visitors.
- Upgraded Attractions to improve the visitor experience.
- New Attractions to enhance the offer and attract repeat and new visitors.

9.19 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'.
- Signage and Orientation Points to facilitate visits to the 'Greatest Roman Frontier' and encourage visitors to explore the sites.
- Information and communications technology (ICT) developments to improve site linkages and external communications.

9.20 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. It is recommended 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.

9.21 Concepts for the main and supporting components recommended by the Major Study are outlined below.

### **'Greatest Roman Frontier' Preview Centres**

9.22 The role of the Preview Centres is a marketing one, aimed at raising the profile of the 'Greatest Roman Frontier' and building awareness of the development plan. 'Greatest Roman Frontier' Preview Centres would be 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. They would be placed at locations where high volumes of people are travelling and are likely to stop for a break or a brief visit. Their proximity to an existing Tourist Information Centre would also be beneficial in minimising running costs. In later phases, their role would broaden to one of facilitating a visit to the 'Greatest Roman Frontier', helping visitors to plan and book a stay/trip to Hadrian's Wall.

- 9.23 Although visitors to the Preview Centres may not immediately re-direct their journey in order to visit Hadrian's Wall, the aim is for the 'Greatest Roman Frontier' Vision to spark their interest and inspire future visits.
- 9.24 The 'Greatest Roman Frontier' Preview Centres would consist of attractive 700 to 1,000 square feet stand-alone showcases that would present the 'Greatest Roman Frontier' Vision to potential guests. These centres would feature visually stimulating artwork and graphics from the 'Greatest Roman Frontier' master plan, along with three-dimensional model displays. They would also feature information stations with cycling, multi-screen video presentations spotlighting the main 'Greatest Roman Frontier' sites. Also, interactive kiosks that link to the Hadrian's Wall website would allow visitors to keep abreast of current events as they unfold.
- 9.25 The showcase and all of its components would be highly durable, easily maintainable and updateable. Management time and maintenance costs would be recognised from the outset to ensure that the Preview Centres stay fresh and appealing to visitors.
- 9.26 A maximum of four Preview Centres is envisaged. Potential locations are:
- Key motorway service stations on the M6 and the A1(M) located north and south of the Hadrian's Wall motorway exit, to catch traffic travelling both North and South in order to ensure a high quality experience.
  - Rheged Discovery Centre in Cumbria.
  - Tourist Information Centres located in northern areas of the Lake District.
  - Ferry terminal in Tyneside (nb need to determine what proportion of arrivals stop at the terminal building to see if this would be worthwhile).
  - Main railway stations.
- 9.27 The final selection should prioritise locations that have the highest visitor throughputs, that have an existing length of stay that is sufficient to allow time to be spent exploring the Preview Centre, and that have an existing infrastructure that can support the running of the Preview Centre and hence minimise running costs. It will also be important that the combination of the selected locations optimises the opportunity to catch potential visitors passing through the main access routes that cross the route of the Wall.

### **'Greatest Roman Frontier' Story Centres**

- 9.28 The 'Greatest Roman Frontier' Story Centres would be unique welcoming visitor centres designed to tell the 'Greatest Roman Frontier' story to guests. Visitors would experience an intriguing overview of Hadrian's Wall as the 'Greatest Roman Frontier' through a compelling assortment of interactive storytelling techniques. Exhibits would fully engage the guests' senses, pulling them deeply into the 'Greatest Roman Frontier' story and piquing their curiosity about Hadrian's Wall's rich heritage.
- 9.29 The centres would be strategically positioned across the expanse of Hadrian's Wall, serving as local hubs. Each hub's story content would be specifically

catered to emphasise both the larger 'Greatest Roman Frontier' story and the distinguishing content of its nearest visitor sites. This content would inspire guests to visit these local sites so that they could view actual artefacts and experience a more in-depth telling of the 'Greatest Roman Frontier' story.

9.30 One main 'Greatest Roman Frontier' Story Centre would be designed for a capacity of up to 240,000 visitors annually. This Centre would be located near the Wall's central section. In addition, four mini 'Greatest Roman Frontier' Story Centres would be developed to act as smaller regional hubs. These mini Centres would accommodate up to 50,000 visitors annually, and could easily be incorporated into existing or proposed new visitor sites.

9.31 The proposed 'Greatest Roman Frontier' Story Centre locations are:

### Western (Cumbria)

- Tullie House, Carlisle – A mini Story Centre, set within the existing Tullie House site. This mini Story Centre will focus on the 'Greatest Roman Frontier' story of the western section of Hadrian's Wall. It will encourage guests to explore other 'Greatest Roman Frontier' sites with an emphasis on West Cumbria.
- Maryport – A mini Story Centre. This mini Story Centre will be included as part of the proposed new attraction. It will focus on the 'Greatest Roman Frontier' story of West Cumbria and its Roman maritime history.
- Ravenglass – A mini Story Centre. This mini Story Centre will be included as part of the proposed new attraction at a later phase of the 'Greatest Roman Frontier' development. It will complement the Maryport story centre in telling the 'Greatest Roman Frontier' story of West Cumbria.

### Central

- Haltwhistle – The largest of the 'Greatest Roman Frontier' Story Centres. This main Story Centre would be housed in a new facility near the Central Section.

### Eastern (Tyneside)

- The new Great North Museum, Newcastle – A mini Story Centre. This mini Story Centre will be included as part of the Roman galleries at the new museum (the new home of the existing Museum of Antiquities collection). It will focus on the 'Greatest Roman Frontier' story of the eastern section of Hadrian's Wall. It will encourage guests to explore other 'Greatest Roman Frontier' sites with an emphasis on Tyneside.

## **Central Transportation Hub**

9.32 The 'Greatest Roman Frontier' Story Centre in the central section would also act as a transportation hub to five of the rural Hadrian's Wall locations. Interpretative bus tours originating from the hub could transport visitors to the various Wall sites. The recommendation is that buses will run at 15 minute

intervals to Vindolanda, the Roman Army Museum and Housesteads, with further services running at 30 minute intervals to Birdoswald and Chesters. Full details of these proposals are set out in the Transport Assessment in Appendix 11.

- 9.33 The aim of the transportation hub is to manage growth in the number of visits in an area of sensitive landscapes, where parking is already at capacity at some sites.
- 9.34 In recommending the location for the transportation hub and Central Section Story Centre, the consultant team considered the following criteria:
- Proximity to main Central Section sites.
  - Access to the A69 and access to public transport.
  - Sensitivity of landscape.
  - Space requirement for Story Centre, car parking and bus depot.
  - Economic regeneration potential.
  - Proximity to potential workforce.
  - Proximity to population centre capable of developing supporting tourism infrastructure.
- 9.35 On consideration of these criteria, the recommended location for this central hub would be somewhere on the outskirts of Haltwhistle, which is close enough to serve the main central sites but does not have the same parking constraints. It is well located to just off the A69 and has an excellent railway station nearby that would allow visitors to use public transportation for their visit. There is sufficient space available to build the necessary car parking and bus facilities as well as the Story Centre itself, thereby minimising the impact of development on the more sensitive landscapes surrounding the existing sites.
- 9.36 Recent closures of local businesses have reduced the number of jobs available in the town, increasing the economic regeneration requirements and growing the available labour market. The town of Haltwhistle also has the potential support broader visitor services such as accommodation, catering and cycle hire.
- 9.37 We recommend that parking prices are used to strategically create optimal traffic flow throughout the 'Greatest Roman Frontier'. For example, parking at the hub could be made free for visitors, while parking fees at the individual sites are raised. This would encourage visitors to use the hubs, and actively discourage them from driving directly to the individual sites. Similarly, all new communication and signage would direct visitors to the hub as the best means of experiencing the 'Greatest Roman Frontier'.
- 9.38 An example of a similar hub that directs visitors to environmentally sensitive sites, is the visitor centre set up at Bru Na Boinne in Ireland. Visitors are now required to park at a central hub where they can purchase combined tickets for bus tours that allow them to visit one or more of the actual sites. This packaging strategy has been very effective. Whilst overall attendance numbers have

continued to escalate at Bru Na Boinne, administrators have successfully managed the flow of guests across sites.

- 9.39 A further example, currently in development, is the new Abraham Lincoln Presidential Museum in Springfield. This is a visitor centre designed to introduce visitors to the life story of Abraham Lincoln and to encourage visits to the other 16 Lincoln-related sites in Illinois. Each of these 16 satellite sites tells a unique aspect of Lincoln's story, yet all are bound by a common story theme laid out in the "Looking For Lincoln" visitor trail.
- 9.40 We believe that the Central 'Greatest Roman Frontier' Story Centre in combination with a Central Transportation Hub will allow for tremendous leverage in accomplishing the 'Greatest Roman Frontier' product development objectives. Administrators can create a more cohesive guest experience while also controlling the distribution of guests and protecting important site resources.

### **Upgraded Attractions**

- 9.41 Upgrades to existing attractions are a core element of our product development strategy. In order to successfully implement the 'Greatest Roman Frontier' Vision we believe that these attraction upgrades must be carried out on two levels:

#### Quality & Consistency Upgrades

- Implementing consistent standards across sites without losing the distinctiveness of each.
- Connecting sites to the 'Greatest Roman Frontier' story and to each other.

#### Product Upgrades

- Differentiating sites and creating news to support marketing efforts.
  - Bringing the 'Greatest Roman Frontier' experience to life.
  - Enabling site events.
- 9.42 Quality and consistency upgrades would serve to unify the various sites of Hadrian's Wall so that each piece of the 'Greatest Roman Frontier' puzzle builds towards a unified whole. These upgrades would involve the implementation of consistent standards across all sites, and the creation of new exhibit media that tells the big-picture 'Greatest Roman Frontier' story. Overall, these upgrades would integrate various Wall sites under one common Vision, providing visitors with a cohesive story experience.
- 9.43 Product upgrades would serve to differentiate between the sites so that each can establish its own unique identity within the larger 'Greatest Roman Frontier' story. A key aspect of the Vision's personality is authenticity. Unique branding of each site could inspire a dramatic storytelling atmosphere across the Wall, leading to repeat visitation by guests and a distribution of visitors across the sites.

- 9.44 Cumulatively, we view these attraction upgrades as an excellent storytelling opportunity. By using 'Greatest Roman Frontier' storylines to both connect the sites and to differentiate them, we could ensure a visitor experience that is at once dynamic, cumulative and cohesive.

### Story Themes

- 9.45 In order to carry out the attraction upgrades, we recommend developing a set of story themes that could be used to compare and contrast 'Greatest Roman Frontier' content for the target sites. As a starting point, we have pulled together the ideas below to illustrate potential story themes that might link the sites, and other themes that could be used to differentiate them.

### Possible Linking Themes

- The role of the Wall and its relevance to Roman history.
- The Roman legacy.
- Legislation, government and administration.
- Communication, transport and provisioning.
- Key personalities.
- Natives north, south and overseas (west & east) of the frontier.

### Possible differentiating themes

- Daily life on the Wall.
- Multi-cultural society.
- Recreation & education.
- Religion & death.
- Roman ideals & values.
- Archaeology – Victorian, living.
- Roman Military.
- Roman maritime history.
- Health & sanitation.
- Engineering & architecture.

### Site Identities

- 9.46 Ultimately each site's unique identity within the larger 'Greatest Roman Frontier' story Vision will grow from its inherent strengths as a heritage offer. Many factors could go into determining this identity, such as existing site ruins, local landscapes and historical themes and the aspirations of the individual site owners. Below are the consultant team's initial thoughts concerning specific 'Greatest Roman Frontier' story elements and themes that might be used to differentiate the sites, indicating that there are many ways in which differentiation can be achieved:

- Maryport – opportunity to tell the ‘Greatest Roman Frontier’ coastal story and Roman maritime history.
- Birdoswald – opportunity to look at Hadrian’s Wall from its historical past to present day. Also, Birdoswald’s site is well situated to provide an alluring location for summer events.
- The Roman Army Museum – opportunity to learn more about the Roman Army. Their legacy of fighting techniques that are still used today and the trials of the soldiers’ daily lives.
- Vindolanda – opportunity to look at everyday life by the Wall, as well as explore unearthed treasures and living archaeology.
- Housesteads – opportunity to highlight this most extensive fort and explore the details of how people survived life on the Wall.
- Chesters – opportunity to focus on the legacy of Victorian archaeologists, and the ingenious Roman designs for bath houses and sanitation.
- Corbridge – opportunity to use frame structures on top of existing foundations to give visitors a sense of scale for these ancient buildings. These structures could also be covered with a theatrical cloth painted to look like the façade of the building. For summer evening events, we could make the ‘walls’ disappear by reflecting light on the painted theatrical cloth. This way, actors or hosts could give performances inside the structures.

## **New ‘Greatest Roman Frontier’ Attractions**

- 9.47 While a priority of the development strategy is to build on the strengths of the existing sites, another aspect of the product development strategy involves the creation of new attractions to complete and augment the ‘Greatest Roman Frontier’ story. In arriving at this recommendation, the requirement for new sites has been considered carefully, to ensure that they support rather than detract from the existing visitor offer.

### *The Role of New Attractions*

- 9.48 In the same way that the strategic objectives of the three main sections of Hadrian’s Wall differ slightly, the role of new attractions will also vary across different sections of the Wall.
- 9.49 In the West there is a need to create sufficient critical mass to encourage visits to the coast and establish a link with the ‘Greatest Roman Frontier’. New attraction developments could help with this, and their potential for encouraging other associated developments should be explored. However, as the current visitor markets to the area are not sufficient to sustain a substantial visitor attendance on a commercial basis, it is important that this development be seen as part of a larger economic regeneration.
- 9.50 In the central section we see an opportunity for a Wall reconstruction. This attraction would be likely to be extremely popular with guests, but timing and placement is key. Before reconstruction takes place, it is important that the ‘Greatest Roman Frontier’ identity has already been established and existing sites strengthened.

- 9.51 Wall reconstruction could be used as an important storytelling component. Multimedia presentations and hi-tech storytelling devices are great media for reconstruction, and are effective to pique visitors' curiosity and create a sense of anticipation for a more visceral visitor experience. However, we feel that 'Greatest Roman Frontier' story experiences will give visitors a deep fascination about Hadrian's Wall that would be greatly increased if guests physically encountered a full-scale reconstruction of it. The reverse may also be true – encountering a Wall reconstruction might stir guests' innate sense of curiosity about its rich history. Either way, it seems that reconstruction is a development idea with tremendous potential.
- 9.52 In Tyneside, plans already exist for a substantial new museum that includes the 'Museum of Antiquities' collection. The opportunity exists for the 'Greatest Roman Frontier' story to strategically link with this effort.
- 9.53 We recommend new attractions be developed at the following locations:

West Cumbria

- 9.54 **Maryport.** There is an opportunity to create an exciting new Hadrian's Wall attraction that presents the story of the only fortified Roman Maritime Frontier. This attraction needs to connect with the existing Senhouse Museum to expand the 'Greatest Roman Frontier' story, to denote Maryport's role in the 'Greatest Roman Frontier' as a central port for provisions to Hadrian's Wall. The new attraction will include the mini Story Centre proposed for Maryport. There is also a requirement to link the new site to existing proposals to develop Maryport Harbour, in order to create the critical mass required to encourage new visitation to the town.
- 9.55 **Ravenglass.** There is an opportunity for adding a new attraction at Ravenglass to further augment the 'Greatest Roman Frontier' product in West Cumbria. The aim would be to link to the recent excavations at Muncaster Castle and other Roman finds in the area. It may be that a combination of a study and visitor centre would best suit this location. The new attraction will include the mini Story Centre proposed for Ravenglass. The recommendation is that this development should be subject to the successful implementation of the Maryport attraction, and should only take place if Maryport is seen to have brought economic regeneration benefits to the local economy.

Central Section

- 9.56 **Undetermined Location.** Once the main story centre and site upgrades have been implemented, we recommend a Wall reconstruction as an exciting and alluring way to augment the 'Greatest Roman Frontier' story and refresh the offer.
- 9.57 The decision on where to locate such a reconstruction and the nature of the reconstruction should be made once the impact of initial phases of the development plan has been assessed.

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*Eastern (Tyneside)*

- 9.58 **Newcastle.** There is the opportunity for the Major Study to strategically link with the plans to develop a new museum (The Great North Museum) in Newcastle, which will include galleries housing the Museum of Antiquities collection. The proposed mini Story Centre would be included within the new museum.

**National Trail and Cycle Paths**

- 9.59 The fact finding stage of the Major Study identified that many visitors to the Hadrian's Wall sites include walking as part of their activities during their trip. In addition, there are visitors who come to the area purely for the purposes of walking, attracted by the landscape setting of the Wall.
- 9.60 The Major Study development plan is aimed at attracting growth in both types of visitors, through the communication of the 'Greatest Roman Frontier'. This will bring both benefits, through increased spending in the area, and costs, due to incremental wear and tear of the National Trail. In recognition of the benefits that the National Trail walks bring to Hadrian's Wall, and the likely growth in utilisation of the National Trail, the Major Study recommends early investment in improvements to the Trail and in the development of Cycle Paths. This investment would be directed at contributing towards the development plans of the Countryside Agency for the National Trail and of Sustrans for the Cycle Paths.
- 9.61 The investment should also be directed at ensuring that the 'Greatest Roman Frontier' benefits from the proposals to create a North West Coastal Trail (from Chester to Carlisle), which will take the route that the Hadrian's Wall National Trail would take if it were to be extended to cover the West Cumbria Coast section of the WHS.

**'Greatest Roman Frontier' Signage and Orientation Points**

- 9.62 The fact finding stage of the Major Study highlighted the confusion created by the current directional signage to Hadrian's Wall and its associated sites. The recommendation of the consultant team is that directional signage is reviewed to create a more sensible hierarchy of signage, aimed at providing clearer direction and better visitor management. Further details of these recommendations are set out in the Transport Assessment in Appendix 11.
- 9.63 The proposed 'Greatest Roman Frontier' orientation points are simple identity markers set at Roman Mile intervals to mark the 'Greatest Roman Frontier' route from Ravenglass to Newcastle. These markers will link the sites and help walkers and cyclists identify where they are positioned within the 'Greatest Roman Frontier' and provide them with directions to nearby sites. These are likely to be very simple and sturdy low-level markers that can withstand all weather conditions and any possible attempts at vandalism.
- 9.64 In addition, there is the opportunity to create larger, more individual markers at key points - such as those visible from main roads - to create intrigue and mark access points to the Wall. These could play a similar, albeit more modestly sized,

role to that of the Angel of the North, which for many people is seen to mark the arrival to the North East.

### **ICT Development - Website and Joint Ticketing**

- 9.65 A website should be designed to support the 'Greatest Roman Frontier', potentially building on the existing Hadrian's Wall website. This site would be accessible at the 'Greatest Roman Frontier' Preview Centres, as well as the standard internet access routes. The website would inform internet users about the 'Greatest Roman Frontier', and should be supported by booking systems (such as England Net) to help visitors plan and book their trips. Also, web functionality that allows guests to buy combined tickets would encourage visitors to spend time at multiple 'Greatest Roman Frontier' sites. To accomplish this we are recommending investment in a ticketing system that supports the sale of tickets across the sites, both in person and through the website.

### **RECOMMENDED SCHEDULE FOR DEVELOPMENT**

- 9.66 The timing of our recommended product development efforts will depend on how quickly the next stages can be implemented following completion of the Major Study. A minimum of one year is likely to be required to evolve the development plan before the launch of Phase I.
- 9.67 The phasing of the 'Greatest Roman Frontier' product development is critical and many factors have been taken into consideration in the sequencing of the development programme. It must ensure that it builds on existing strengths, delivers an excellent experience for early adopters, and maintains an on-going development programme that inspires repeated visitor interest in the 'Greatest Roman Frontier'. This phasing strategy must also serve to minimise short-term displacement from current sites.
- 9.68 It is also important that activity takes place on the West Cumbria coast in parallel with the development in the North East region, to help establish that the 'Greatest Roman Frontier' extends along the West Cumbria coast, in addition to the better known route of the Wall itself.
- 9.69 We initially propose that these events unfold in five phases. The timing of these phases will be dependent on the speed with which the proposed new organisational structure is set up and on how quickly funding is sourced for the Development Plan. The five phases, together with the consultant team's initial recommendations on timing, are as follows:

#### ***Phase I***

- 9.70 The first phase is to establish the 'Greatest Roman Frontier' Preview Centres. We recommend that four centres be built. The exact locations for these centres is open to debate, however selected sites should have high volumes of passing traffic and sufficient space to house them, as set out earlier. The consultant team's recommended timing for this Phase is 2005.

***Phase II***

- 9.71 Phase II has three major elements. Firstly, a new attraction would be launched at Maryport, which would include a mini Story Centre. This would link to the existing Senhouse Museum, which would be upgraded in order to present its role within the 'Greatest Roman Frontier'.
- 9.72 Secondly, the Central Section 'Greatest Roman Frontier' Story Centre and central transportation hub will be constructed at Haltwhistle and the interpretive bus tour designed. This will be supported by quality and consistency upgrades at all the Central Section sites and product upgrades at four of these sites. As plans for Housesteads, Chesters and Vindolanda have already progressed, we suggest that these be given priority for upgrades, followed by The Roman Army Museum.
- 9.73 Additionally, improvements to the Hadrian's Wall National Trail and Cycle Paths will be implemented early to help protect the landscape and new directional Signage and Orientation Points will be installed along the 'Greatest Roman Frontier' route. The consultant team's recommended timing for Phase II is 2006/7.

***Phase III***

- 9.74 In Phase III, we propose product upgrades be given to the final two central section sites, Corbridge and Birdoswald. At the same time a product upgrade would be planned for Tullie House, Carlisle, which ties in with their own plans to enhance the Roman galleries by incorporating finds from the Millennium digs recently displayed at Carlisle Castle. A mini Story Centre would be included within this to ensure that the story of the 'Greatest Roman Frontier' as a whole is presented and that visitors are encouraged to explore other parts of the 'Greatest Roman Frontier', specifically those in West Cumbria. The consultant team's recommended timing for this Phase is 2008.

***Phase VI***

- 9.75 The new museum in Newcastle that incorporates the Museum of Antiquities is scheduled to open in 2009. By including a mini Story Centre within this facility, we could link it to the existing sites in Tyneside and strengthen the overall heritage offer in this area. At the same time product upgrades would be planned for Arbeia and Segedunum. The consultant team's recommended timing for this Phase is 2009.

***Phase V***

- 9.76 Phase V is dependent upon the success of the previous four phases. This is particularly true for developments in West Cumbria. If the Maryport development proves successful in regenerating the local economy we suggest exploring opportunities for adding a new attraction at Ravenglass.
- 9.77 Phase V includes Wall reconstruction in the Central Section. We see an opportunity here for a major new development that would refresh the product

and maintain a high profile for Hadrian’s Wall. Further capital funding has been allowed to develop the Haltwhistle Hub during this phase, to manage the projected growth in attendance levels and to ensure that the details of the reconstruction site are included within the Story Centre. The consultant team’s recommended timing for Phase V is 2010.

9.78 This is not intended to be the end of development at the ‘Greatest Roman Frontier’. This strategy merely sets out a foundation from which further developments could evolve. Future developments will depend on the success of previous phases, and upon any other important external factors that may exist.

***Summary of Schedule for Development***

9.79 A summary of the schedule for development is set out in Figure 9.1.

**FIGURE 9.1  
HADRIAN’S WALL MAJOR STUDY  
SUMMARY OF DEVELOPMENT SHCHEDULE**

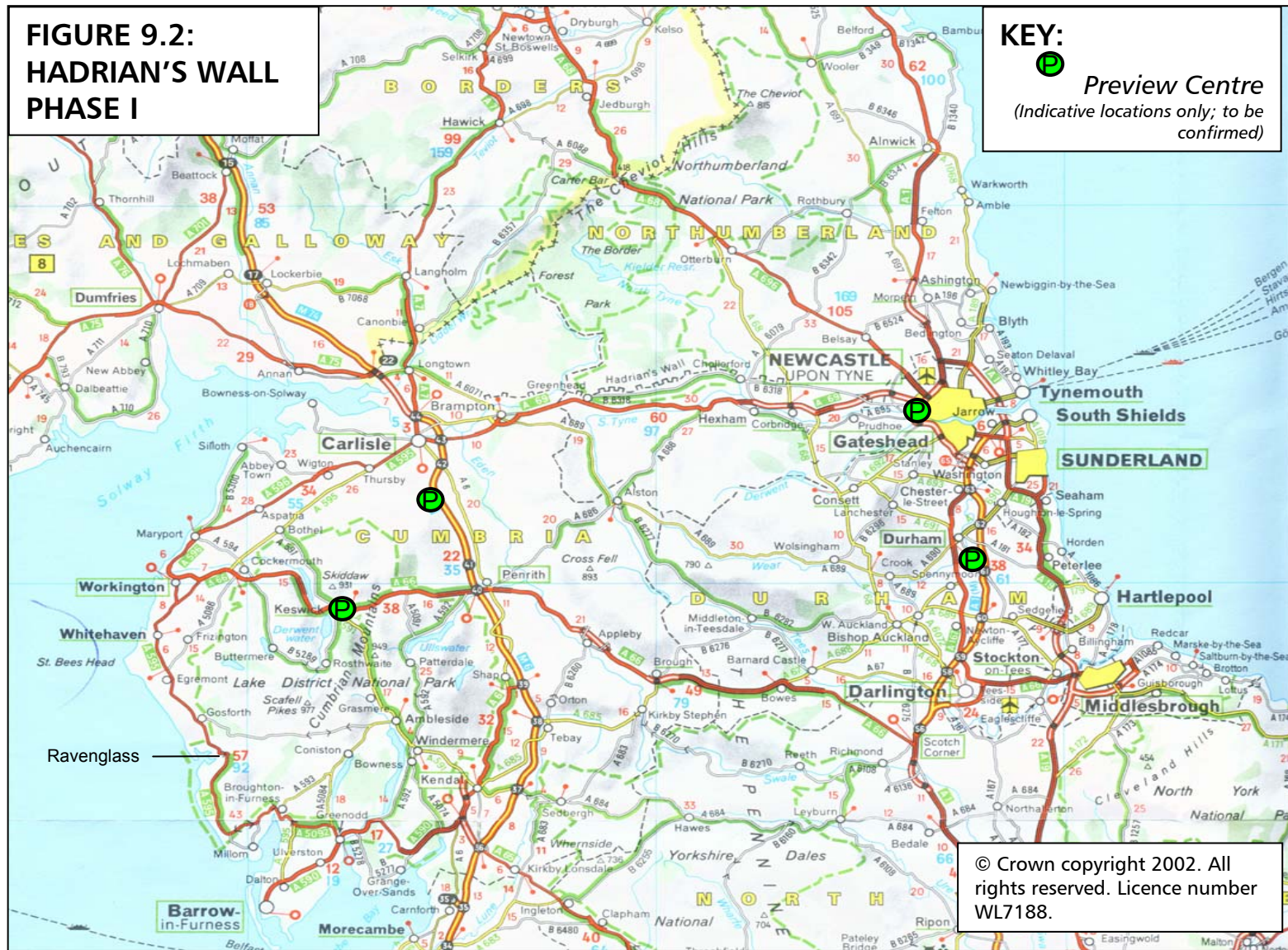
<b>Phase</b>	<b>Development Plan Components</b>
Phase I	Install ‘Greatest Roman Frontier’ Preview Centres.
Phase II	New Attraction and Mini Story Centre: Maryport. Upgrade at Senhouse Museum, Maryport. Main Story Centre and Central Transportation Hub: Haltwhistle. Upgrades: Chesters, Housesteads, Roman 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*

9.80 Figures 9.2 to 9.6 set out each phase of development.

**FIGURE 9.2:  
HADRIAN'S WALL  
PHASE I**

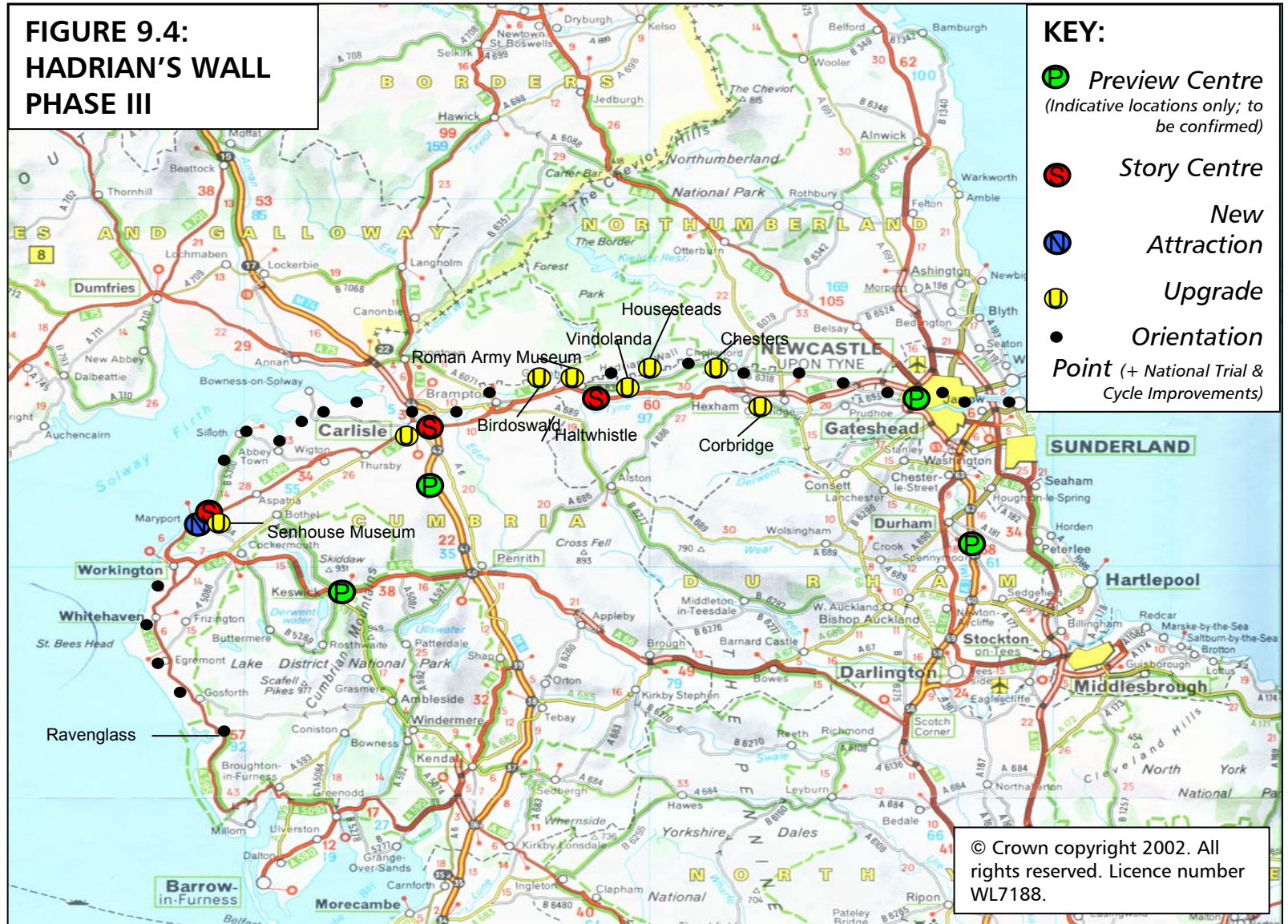
**KEY:**  
 Preview Centre  
*(Indicative locations only; to be confirmed)*



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**FIGURE 9.4:  
HADRIAN'S WALL  
PHASE III**



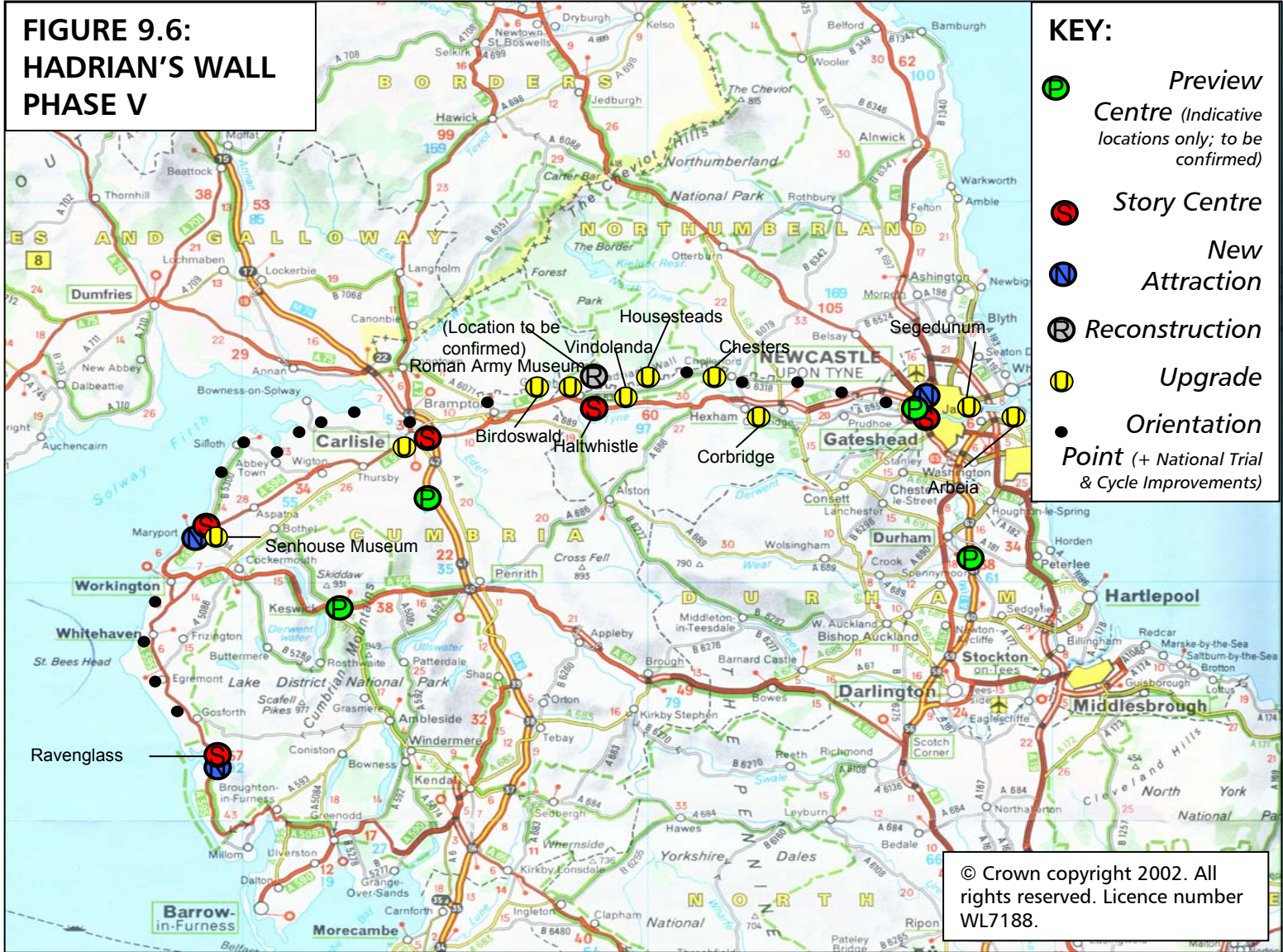
- KEY:**
- Preview Centre  
(Indicative locations only; to be confirmed)
  - Story Centre
  - New Attraction
  - Upgrade
  - Orientation Point (+ National Trial & Cycle Improvements)

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**FIGURE 9.6:  
HADRIAN'S WALL  
PHASE V**

- KEY:**
-  Preview
  -  Centre (Indicative locations only; to be confirmed)
  -  Story Centre
  -  New Attraction
  -  Reconstruction
  -  Upgrade
  -  Orientation Point (+ National Trial & Cycle Improvements)



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**INITIAL CAPITAL COST ESTIMATES OF DEVELOPMENT PLAN**

- 9.81 Costing the capital requirements before creating more detailed concept designs and identifying target sites is extremely difficult. Therefore, the capital cost estimates set out in Figure 9.7 and Figure 9.8 are initial top line estimates, and are based on industry ranges for typical investment per visitor.
- 9.82 A total of £19 million has been allowed for the development of existing sites, to provide quality and consistency upgrades at each site and to enable the implementation of the proposed product upgrades at the existing sites. For the purpose of the Economic Impact Model, a proportion of this budget has been allocated to specific sites. However, this is for the model purposes only and should not be taken to reflect any detailed assessment of the site by site development requirements. Detailed assessments conducted as part of the next phase of the development programme, post the Major Study, will inform the allocation of the total budget between sites.
- 9.83 In addition to the development plan components described earlier, a further allowance of £1.00 million has been made pre Phase I 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. This brings the total recommended capital investment to an estimated £56.25 million.
- 9.84 Figure 9.7 shows the estimated capital cost for each of the proposed phases of the development plan.

**FIGURE 9.7  
INITIAL CAPITAL COST ESTIMATES BY PHASE OF DEVELOPMENT PLAN**

Development Plan Phase	Capital Costs <i>(Millions)</i>
Phase I	£4.75
Phase II & III	£31.50
Phase IV	£5.00
Phase V	£15.00
<b>Total</b>	<b>£56.25</b>

*Source: Consultant Team led by BRC Imagination Arts*

- 9.85 Figure 9.8 sets out the estimated capital costs for each component of the development plan.

**FIGURE 9.8  
INITIAL CAPITAL COST ESTIMATES OF DEVELOPMENT PLAN**

Development Plan Component	Phasing of Development Plan Component	Capital Costs <i>(Millions)</i>
Preview Centres	Phase I	£2.00
Haltwhistle Story Centre & Transport Hub	Phases II & V	£12.00
Upgrades (including mini Story Centre at Tullie House)	Phases II, III & IV	£19.00
Maryport/Museum of Antiquities/Ravenglass (including mini Story Centres)	Phases II, IV & V	£9.00
Reconstruction	Phase V	£10.00
National Trail & Cycle Paths	Phase II	£0.50
Signage & Orientation Points	Phase II	£1.00
ITC (website and ticketing) & Marketing	Phase I	£1.75
Development Programme	Pre Phase I	£1.00
<b>Total</b>		<b>£56.25</b>

*Source: Consultant Team led by BRC Imagination Arts*

## ***ASSESSING ADJUSTMENTS TO THE DEVELOPMENT PLAN***

9.86 During the first year of development it is likely that adjustments may be made to the development plan as more detailed assessments are conducted for each component of the plan. In addition, whilst the phasing and the development plan takes into consideration a broad range of issues, these too may change over time.

9.87 The impact of any such changes can be assessed and measured through the Economic Impact Model. This model, which is discussed in detail in Section 11, has been developed to enable it to be used as a future assessment tool by the development team.

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## ***RECOMMENDED NEXT STEPS POST MAJOR STUDY***

- 9.88 Following the Major Study, we see a need to identify specific locations for each of the product development elements and conduct more detailed studies on each. We therefore recommend implementing a physical master plan and concept design for the 'Greatest Roman Frontier'. This would include:
- A story master plan that connects all aspects of the Hadrian's Wall visitor experience into a unified story. The story would guide design decisions related to the visitor experience and would be evident in everything the visitor sees, hears, feels and experiences.
  - A site utilisation plan that would define how best to optimise land and site facility usages related to the visitor experience. This plan would help determine site-specific issues and their relationship to the overall design of the visitor experience. This plan considers factors such as visitor flow and circulation, interior and exterior access corridors, operations, parking, transportation and possible future expansions.
  - Defined concepts for product components.
  - Preliminary budgets for component design and production.
- 9.89 The key to linking and differentiating the sites will be the story threads and themes of the 'Greatest Roman Frontier'. We recommend that the designers put together a panel consisting of Hadrian's Wall historians, site curators and archaeologists, as well as attraction designers and interpretation experts, to develop the details for each site within the context of the Wall-wide interpretation and content strategy.. This would help to develop the most appropriate and inspiring storylines.
- 9.90 We also recommend that the designer collaborate with specialists in feasibility, operations, landscape, and transportation to create an appropriate physical master plan.

## ***IMPACT ON CURRENT INITIATIVES***

- 9.91 There are several existing initiatives proposed for development projects in the area. Some of these are already under discussion for integration into the strategy, others may have complementary roles. The main ones are:
- Northumberland PDP bid: Housesteads, Chesters and Vindolanda.
  - Museum of Antiquities.
  - Senhouse Museum fortlet and settlement.
  - Tullie House development project.
  - Carvoran proposals.
  - Northumberland National Park.
  - Kielder.
  - Extensions to Hadrian's Wall Trail.

- North West Coastal Trail.
- Sustrans cycleway.

### ***Northumberland PDP bid: Housesteads, Chesters and Vindolanda***

- 9.92 In 2003 Northumberland County Council developed an ERDF bid under the Objective 2 strategic sites opportunity for its two main attractions, The Alnwick Garden and Hadrian's Wall Central Section. The bids were submitted and accepted. Whilst the original estimates were for a total investment of £7.1 million for the Hadrian's Wall sites, £4 million for Housesteads, £2.9 million for Chesters and £0.2 million for Vindolanda, more recent estimates of the cost of the proposals are £4.8 million for Housesteads and £3.1 million for Chesters.
- 9.93 To be compliant with the ERDF grant requirements the contracts have to be let by December 2004. However, the Hadrian's Wall element of the bid has encountered difficulties with car parking requirements at Housesteads, and may now be held up by the requirement, under the Major Study, to ensure that a differentiation policy is agreed for all development projects. Under the Major Study recommendations a team would be formed to agree the interpretive approach for all new developments, to ensure differentiation and avoid overlap.
- 9.94 It is currently felt that the interpretation elements of the contracts cannot be let in advance of this team being formed and an outline policy agreed. The team would not be formed until the new Hadrian's Wall management body, or a transitional body has been formed.
- 9.95 Thus there is a need for the future organisational structure to be resolved quickly, so that the sites can benefit from ERDF funding.

### ***Museum of Antiquities, Newcastle***

- 9.96 This is a comprehensive scheme for the co-location of some of the collections together with the Antiquities collection of Hadrian's Wall artefacts and displays, which includes a large linear model of the entire WHS site. The collections will become part of the new The Great North Museum, in Newcastle.
- 9.97 At the time of writing the projected budget for the new museum is £36 million, of which the Hadrian's Wall element is in the order of £6 million. The development plans set out earlier, include the integration of this new museum in Phase IV.

### ***Senhouse Museum Fortlet and Settlement***

- 9.98 Adjacent to the Senhouse Museum is a largely unexcavated site of a fortlet and what is believed to be the original settlement in Roman times, when the Wall was provisioned by sea from Maryport.
- 9.99 The Senhouse Museum Trust is letting a contract in March 2004 for an options appraisal of how to take the project further. This project is potentially in tune

with the mini Story Centre attraction proposed for Maryport and, alongside existing development plans for the Harbour, should help build the critical mass required to attract incremental visitation to Maryport.

### ***Tullie House Development Project***

- 9.100 Under a new Department of Culture, Media and Sport strategy for museums, Tullie House has been nominated as a sub-regional hub museum which gives it extra state money for development. It intends to redevelop the Hadrian's Wall gallery as part of this initiative, probably by creating extra space through a building extension.
- 9.101 This project is potentially in tune with plans for a mini Story Centre in Carlisle, which are shown in Phase III of the development plan.

### ***Carvoran Proposals***

- 9.102 The Vindolanda Trust has been developing plans for a reconstruction of the Roman fort at Carvoran, to the rear of its Roman Army Museum off the Military Road. There is an element of controversy over the decision in that under ICOMOS\* regulations reconstructions may not be made on the site of the original archaeology while that archaeology might still exist. The project is supported by Tynedale District Council, the local planning authority.
- 9.103 The Major Study recommends that reconstruction is considered in Phase V of the development plan. Both Carvoran and proposals to reconstruct a section of the Wall in the Central Section are potential projects that would satisfy the longer term objective of reconstruction, subject to their complying with the requirements of the Hadrian's Wall WHS Management Plan.

### ***Northumberland National Park Authority***

- 9.104 The Park Authority has been developing plans for expansion of its visitor facilities in the form of an interpretation of the landscape. Initially it intended to place the centre at Once Brewed where there is also a YHA hostel which is listed for redevelopment and expansion. The plans for the interpretive parts of this scheme were originally intended for the Northumberland County Council PDP bid for ERDF funding, but the Authority had difficulty in demonstrating that it could deliver the outputs needed under ERDF rules and hence the proposals were not included in the bid.
- 9.105 The development of Once Brewed has not been included in the Major Study development plan as it was not considered to meet the criteria for the location of the Central Story Centre and Transport Hub. The Authority is now understood to be reviewing their proposals outside of the Major Study.
- 9.106 The proposals to develop and expand the YHA hostel should be encouraged and supported, as these could have a mitigating effect on the accommodation shortage identified during the fact finding stage of the Major Study.

### ***Kielder***

- 9.107 A partnership has been formed between Kielder Water (Northumbria Water) and Kielder Forest (Forest Enterprise) to pursue a joint development project to improve revenue from recreation and rationalise the three visitor centres. A feasibility study is in its final stages. The area includes accommodation which, if expanded, could relieve the pressure for more accommodation for visitors in Tynedale.

### ***Improvements to Hadrian's Wall National Trail***

- 9.108 The National Trail opened to the public in June 2003. The total annual costs for running the National Trail are estimated to be around £380,000 per annum, including an allowance of £100,000 for capital works.
- 9.109 By late autumn 2003 the Trail was showing signs of wear and tear, leading to concerns that the level of usage could not be sustained without further development.
- 9.110 One proposal by the Countryside Agency to alleviate the impact of walkers on the Trail is the development and promotion of circular walks leading from the Trail. There are currently 42 circular walks leading from the National Trail that are open to the public and are promoted by the Countryside Agency, at a cost of £10,000 to £12,000 per annum.
- 9.111 As the impact of walkers on the Trail is greatest during the winter months, when wet weather speeds up the erosion of the trail, the Countryside Agency is proposing that some 20 new walks be promoted each winter in the National Trail Passport. The cost of developing and promoting the walks is estimated to be in the order of £80,000 per annum. With over 100 walks available within the WHS there will be the opportunity to change the selection of walks promoted each year, thus softening the impact of usage on any one walk.
- 9.112 In addition to the recommended capital investment of £500,000 in the National Trail, Cycle Paths and links to the North West Coastal Trail, the Major Study recommends an annual contribution to the running costs of these paths of £200,000. This is a reflection of the incremental costs of maintenance that a growth in visitation will incur, and the objective of improving the current facilities to support this growth.

### ***Sustrans Cycle Path***

- 9.113 Sustrans are aiming to launch a Hadrian's Wall Cycle Path in 2005, stretching from Tynemouth in the East to Ravenglass on the West Cumbria Coast. The route alignment has already been planned, sharing those parts of the National Trail that have a minimum access level of Bridle Ways. Whilst much of the proposed route is already open, there is a requirement to create linkages in some places.

- 9.114 Sustrans estimate that the total cost of developing the Cycle Path will be in excess of £1 million. An initial estimate of the running costs of the Cycle Path is around £265,000 per annum, assuming further support by local authorities.
- 9.115 As stated above, in addition to the recommended capital investment of £500,000 to support development of the National Trail, Cycle Paths and links to the North West Coastal Trail, the Major Study recommends an annual contribution to the running costs of these paths of £200,000. This is a reflection of the incremental costs of maintenance that a growth in visitation will incur, and the objective of improving the current facilities to support this growth.

### ***The North West Coastal Trail***

- 9.116 The North West Coastal Trail is a proposed new regional trail that will run from Chester to Carlisle along the coast of North West England. It will be multi use and will link and enhance existing footpaths, cycle paths and bridleways as well as other regional and national trails such as the Coast to Coast Path and the Trans-Pennine Trail.
- 9.117 A feasibility study, funded by the NWDA, was published in April 2003 and gave the green light to the project. The project is being led by the North West Coastal Forum, who together with the North West Regional Assembly are jointly funding the production of an Implementation Framework, due to be completed by the end of April 2004. The Framework will outline the practical steps required to develop the trail and provide indicative costs for each step.
- 9.118 The North West Coastal Trail potentially provides an excellent opportunity to extend the walking and cycling facilities into the West Cumbria Coastal section of the 'Greatest Roman Frontier'. This would require agreement with the North West Forum that the 'Greatest Roman Frontier' branding be used for the Ravenglass to Carlisle section of the Trail.
- 9.119 The Major Study recommends that early discussions with the North West Coastal Forum are initiated to progress this opportunity. Whilst co-operation could help the establishment of the 'Greatest Roman Frontier' along the coastal route, without this co-operation the result will be confusion for potential visitors, with two identities being developed for the same stretch of coast.

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## 10. MARKETING AND COMMUNICATIONS STRATEGY

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### *INTRODUCTION*

10.1 Marketing and Communications will be critical from the early days of the implementation programme for the Major Study. The first activities in this area will need to take place as part of the formation of the implementing body. Indeed the management of the launch of the Study itself will require a communication plan. The section below sets out what will be required in the marketing and communications area.

### *STRATEGIC REQUIREMENTS*

10.2 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.

10.3 This will require a marketing strategy and communication plan which, to be effective, would have the following attributes:

- A single decision making body which designs and executes the strategy.
- Central funding which gives the budget enough clout 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.

10.4 There are organisational issues in ensuring that an effective marketing body, or team, is in place at the right time to be effective.

10.5 The Vision for Hadrian's Wall has the audacious goal: To move Hadrian's Wall from a Northern 'ought to see' to a global 'must see, stay and return for more'.

10.6 Working to this goal the objectives for the central marketing body will be to achieve or exceed the visitor projections for the whole Hadrian's Wall area. These have been identified under the following categories:

- Those who visit one or more attractions, either as staying or day visitors.
- Those who walk the wall, some of whom may also visit attractions and some of whom may not.

- General tourists drawn to the area because of its raised profile.
- 10.7 These tourists will be targeted from the UK domestic market and also from the overseas market. In the northeast region, Hadrian's Wall has traditionally drawn a higher proportion of overseas visitors than has the region itself or most of its attractions, while in the northwest, Cumbria and the Lakes is the most highly recognised brand after London among overseas visitors.
- 10.8 The task of the marketing team will be to increase the numbers of visitors in these categories from the 776,000 of end 2003 to over 1 million in 2011.

### ***TOOLS AND CHANNELS AVAILABLE TO THE MARKETING TEAM***

- 10.9 The key tool for the team will initially be the presence of the Preview Centres which will be placed in areas of high footfall on the periphery of Hadrian's Wall, for example in Cumbria, Tyne and Wear, County Durham and/or Northumberland. Supporting print will trail the future plans and be designed to create a feeling of anticipation and excitement, so that local people, day visitors and tourists will start to form an intention to visit for when the new projects are finished year by year.
- 10.10 Many of the main channels of communication will be via partnership arrangements with, among others, Visit Britain, England's North Country, Cumbria Tourist Board and the new sub-regional tourism organisations for Northumberland and Tyne and Wear.

### ***THE 'GREATEST ROMAN FRONTIER' AND THE MARKETING OF THE NORTH OF ENGLAND***

- 10.11 Both of the RDAs have devolved major marketing campaign planning to the sub-regional level. These campaigns then link up under umbrella themes in line with Visit Britain's new marketing strategy. This would be in keeping with the two agencies' strategic need to raise the tourism profile of the North of England, using Hadrian's Wall as an 'attack brand', a marketing concept that has been developed in the North West.

### ***TIMING***

- 10.12 Timing is a critical issue in the Marketing Strategy. An important part of the build-up of awareness is the presentation of the development programme in the Preview Centres, and the supporting collateral material and website will be the first executional work of the marketing team. Preceding this activity however there is likely to be a six to nine month programme which would involve:
- Recruitment of the marketing director and team.
  - Creative development of the Hadrian's Wall brand identity for use in all relevant media.
  - Preparation of the promotional and media plans.
  - Input to the design and specification of the cross-site ticketing system.

- Preparation of the budget and negotiation with budget partners.
- 10.13 It is likely that the marketing team will be part of the project team involved in the development of the Preview Centres since the role of these centres is essentially one of communication, and this also affects the timing of the mobilisation of the marketing team.
- 10.14 A suggested timetable for the marketing and communications strategy is set out in Figure 10.1

**FIGURE 10.1  
HADRIAN'S WALL MARKETING TIMETABLE**

Year	Key Tasks
Year 0	Creation of marketing resource (within or reporting to new organisation). Brand development, origination development work and communication planning for Phase I activities.
Year 1	Launch of the new website. Production of support material for the Preview Centres, working with an interpretation content team.
Year 2	Supporting material and campaigns for the launch of Phase II developments.
Years 3-8	Continued support for new launches & general support for building up the three main markets of heritage visitors, walkers and general tourists (to include sustainable transport options).

*Source: Consultant Team*

**TOP LINE COSTS OF IMPLEMENTATION**

- 10.15 The costs of implementing the marketing and communications strategy are reflected in both the capital and revenue budgets. It is expected that there will be some partnership cost sharing in both budgets.
- 10.16 There is a suggested pre-launch budget of £2.75 million in the capital budget. Of this, £1.00 million has been recommended for the Year 0 development programme and site differentiation interpretation strategy. Within the remaining costs are the design and setting up of the ticketing system, the brand building work, web-site development and initial marketing costs such as origination and content development.

10.17 In the revenue budget there would be a marketing budget of £1.50 million per annum, part of which would be joint-funded by partners and advertising revenues.

## **11. ECONOMIC IMPACT OF STRATEGY**

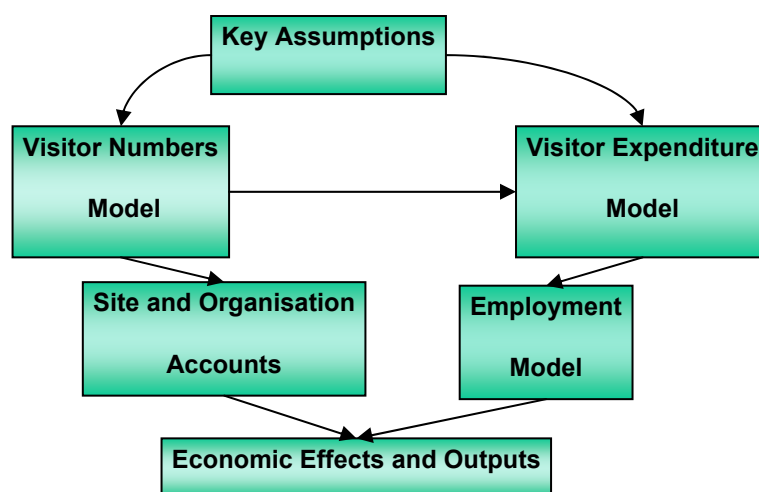
### **INTRODUCTION**

- 11.1 Part of the testing of the Strategy emerging from the Major Study was to investigate the economic impact of the new proposals in both of the RDA regions. This was carried out by Caledonian Economics Ltd with inputs from the consultant team on assumptions.
- 11.2 The Economic Impact Model is based on the assumption that the timing of the proposed Development Plan is consistent with the consultant team’s initial recommendations, as set out in Section 9. This recommendation is that Phase I of the Development Plan opens in 2005, and that Phase V is completed in time to open in 2010. Achieving this timing will be dependent on how quickly the implementation of the proposed new organisational structure can be achieved, and on successfully securing funding for the Development Plan.

### **THE STRUCTURE OF THE ECONOMIC IMPACT MODEL**

- 11.3 The Economic Impact Model constructed for Hadrian's Wall by Caledonian Economics Ltd has the structure set out graphically in Figure 11.1.

**FIGURE 11.1 ECONOMIC IMPACT MODEL STRUCTURE**



- 11.4 The model methodology is explained in greater detail in Appendix 9, where the full model results are also shown. The model comprises a single Excel spreadsheet, within which different worksheets are integrated as follows.
- 11.5 Worksheet IA: The Financial Assumptions Worksheet – into which financial assumptions are input. This worksheet covers the following:

- Development costs of the component projects within the overall Hadrian's Wall development programme, with an attribution to an RDA area based on the geographical location of the development.
  - Site operating parameters – covering average net expenditure per visit at each site, staff requirements per thousand visitors, cost of sales as a percentage of turnover, and other operating costs as a percentage of turnover. The site operating parameters are based on a standard cost model for visitor attractions on Hadrian's Wall and elsewhere, and generate forecasts regarding the likely revenues and costs accruing to each site, based on the number of visitors they attract.
  - Non-attraction specific costs, including incremental central organisation marketing costs and transport hub costs (including the costs of operating a bus from the Haltwhistle hub to the individual sites on the Wall), and costs such as the maintenance of the trail and cyclepath.
  - Average rates of visitor expenditure per trip per visitor off-site – this parameter is important in driving estimates of the wider economic impact of the development programme.
  - The average allocation of visitor expenditure between accommodation, meals out, retail spending, travel within the region, admissions to other sites, and other services and entertainment.
  - Factors used for the economic analysis, including the discount rate for Net Present Value calculations, average turnover per job and average cost per job.
- 11.6 Worksheet IB provides forecasts for the growth in visit and visitor numbers at each site on Hadrian's Wall as investment comes on stream. Worksheet IC gives forecasts for the growth in visit and visitor numbers in the Hadrian's Wall area generally from 'non-site visitors' – i.e. those who come to look at the Wall, but do not visit any site on it.
- 11.7 Worksheet II computes forecast operating costs for each site on Hadrian's Wall, using the visit assumptions input to Worksheet IB and the standard revenue and cost assumptions input to Worksheet IA. These assumptions are based on actual data for selected existing sites, averaged to provide an indicative estimate of revenues and costs for all sites. This worksheet provides forecasts of visitor expenditure on-site at each site.
- 11.8 Worksheet III computes expenditure off-site of Hadrian's Wall visitors, and also calculates how much of this is incremental expenditure compared to 2002. This worksheet also allocates expenditure between the North-West and North-East sections of Hadrian's Wall.
- 11.9 Worksheet IV computes the economic impact of the development programme, by discounting the incremental visitor expenditure on- and off-site against the development costs and net operating costs generated by the programme to arrive at a net cash flow for the programme as a whole. The Net Present Value (NPV) of the programme has been calculated by discounting the net cash flow at a 3.5 percent real discount rate, and the model also computes the economic rate of return of the programme. Worksheet IVA provides an NPV and economic rate

of return for the Hadrian’s Wall development as a whole. Worksheet IVB computes the NPV and economic benefits based on visitor expenditure for the North-West region and Worksheet IVC for the North-East region. It should be noted that, at this stage in the model design, it has been assumed that the economic benefits of each development component relate purely to the region in which that component is located, whereas in reality some of the benefits will be felt across both of the RDA areas. Central costs, such as marketing, which accrue to the entire development, have not been allocated between the two areas.

- 11.10 Worksheet V provides an NPV analysis for the Hadrian’s Wall development, and includes an Employment Model computing the total number of jobs generated by Hadrian’s Wall visitor expenditure by region.
- 11.11 Worksheet VA summarises the key outputs from the model in a form consistent with outputs used in ERDF submissions. This worksheet provides figures for the total public sector investment cost, new turnover generated by the programme, new jobs created by it, the number of tourist visitors, and the public sector investment cost per net new job.

***VISITOR NUMBERS AND EXPENDITURE***

- 11.12 The main principle of the projections for growth in visitor numbers is the stimulation and management of demand through:
  - The first significant investment in the original attractions along the Wall in some 30 years, bringing the quality of the visitor experience up to the levels expected by an international and national audience for a World Heritage Site.
  - The introduction of new attractions including the extension to the West Cumbria coast.
  - Effective and co-ordinated communication and marketing of the Wall, year on year.
  - Management of the visitor impacts on sensitive areas through the sustainable transport plan.
- 11.13 This has been developed into a visitor model on the lines described below.
- 11.14 Growth factors have been applied to the numbers of visits to the current attractions, and relatively modest visit numbers have been set for new attractions as they come on stream. Figure 11.2 sets out the resultant growth predictions for numbers of visits to 2011.

**FIGURE 11.2**  
**EFFECT OF GROWTH FACTORS ON ATTRACTION VISITS OVER TIME (000’S)**

Year	2003	2005	2006	2007	2008	2009	2010	2011
Attraction visits	585	615	889	929	942	978	1,218	1,218

*Source ERA visitor model, 2003 figures supplied by HWTP*

- 11.15 To arrive at these growth projections it is assumed that there will be a five percent growth in attendance across all sectors with the arrival of the Preview Centres. Then, following investment in the attractions and the Hub the attendance figures are assumed to rise by 20 percent in the nearest sites to the Hub in the central section, 15 percent in Carlisle and 10 percent in Birdoswald, Corbridge and Tyne and Wear. It is assumed that 60 percent of visitors to Roman Army Museum, Vindolanda and Housesteads will start at the hub, as will 25 percent of those who visit Birdoswald and Chesters. It has been assumed that these growths in attendance will be achieved in the opening year of the new developments and that attendances will stabilise at these levels in subsequent years.
- 11.16 Following this exercise these visit figures were converted into visitor figures by applying a multiple site factor derived from the MEW research conducted during the period Easter-October. The factors by which visits were converted to visitors varied over time as the ability and propensity of visitors to visit more than one site in a visit were projected to increase. The factors used are set out in Figure 11.3.

**FIGURE 11.3  
ASSUMED NUMBER OF VISITS TO SITES PER VISITOR, 2003 TO 2011**

:	2003	2006	2010	2011
Ordinary day visitors	1.20	1.50	1.80	1.80
Ordinary stay visitors	1.50	1.80	2.10	2.10
Serious walkers – day visitors	1.00	1.02	1.05	1.05
Serious walkers – stay visitors	1.10	1.40	1.60	1.60

Note: For non-attraction visitors, 1 visit = 1 trip

*Source: Consultant Team*

- 11.17 This produces a set of projected visitor numbers which were then divided into the categories of walkers and 'ordinary' attraction visitors along the lines of research conducted in 2002 from an analysis of national park and NTB research studies. This analysis is appended to Volume 1 of the Hadrian's Wall Central Section Economic Impact Study, 2002.
- 11.18 To these numbers were added projections for non-attraction visitors, both walkers and ordinary visitors whose role in visiting the Wall was identified in the same studies.
- 11.19 With this methodology a set of projections for Hadrian's Wall was produced in which visitor numbers are forecast to increase by 34 percent between 2003 and 2011. These projections are set out by type of visitor in Figure 11.4.

**FIGURE 11.4  
GROWTH OF VISITORS BY CATEGORY**

Year:	2003	2011
	(000s)	(000s)
Attraction visitors	348	496
Walkers who also visit attractions	110	169
Walkers who do not visit attractions	31	48
General tourists	287	325
<b>Total</b>	<b>776</b>	<b>1,038</b>

*Source: Consultant Team*

11.20 The reason it is important to categorise the visitors into different types is because each category has a different spend profile from the point of view of the economic impact of their visit. In the model, data is collected for admissions and other on-site spend in the financial data for each site, depending on the number of visits. This is then merged with different levels of off-site expenditure that takes place in the two RDA regions during the time associated with their visit. This off-site expenditure has been set at different rates according to the type of visitor. The rates of expenditure by visitor type are set out in Figure 11.5.

**FIGURE 11.5  
EXPENDITURE BY VISITOR TYPE**

Visitor Type	Average Expenditure
Ordinary day visitors	£4.50
Ordinary stay visitors	£155.00 (4.2 nights at £37 per night)
Serious walkers - day	£4.50
Serious walkers – staying	£136.00 (4 nights at £34 per night)
Non-site visitors, day	£4.50
Non-site visitors, stay	£36.00 (based on 1 day only of their visit)

*Source: HW Visitor Audit & UKTS*

11.21 In addition to this spend at the beginning of the development, a growth factor of three percent per annum has been applied to this expenditure level, over and above inflation, which is caused by improvements in the offers made in the area, upgrades, more opportunities for visitors to spend as new businesses come into

the market or current ones extend their opening hours. This annual growth rate is assumed to run from 2006 to 2011.

11.22 The model shows that the impact of these assumptions on visitor expenditure across the two regions is a growth of 72 percent by 2011.

## ***DEVELOPMENT COSTS***

11.23 The estimates of the capital costs of developing the various components comprising the Hadrian's Wall development plan are based on BRC Imagination Arts' top line costs and ERA estimates of industry standards, unless stated otherwise. These are preliminary cost estimates that will need to be examined in detail during the next steps following the Major Study. The development cost assumptions for each component are set out below.

11.24 The development costs estimated for new attractions and the Central Story and Transport Hub at Haltwhistle are made up as follows:

- A total of £19 million will be required to establish new attractions in Maryport (£3m), Ravenglass (£3m), and reconstruction in the Central Section (£10m), plus a contribution to the new Newcastle Museum (£3m) for the Roman galleries. The developments at Maryport, Ravenglass and the new Newcastle Museum, will include mini Story Centres.
- £12 million will be required to establish a new Central Story Centre and Transport Hub at Haltwhistle.

11.25 Of the total £31 million shown above, £13 million will be invested in the Phase I of the Hadrian's Wall development coming on stream in 2006, £3 million in Phase IV coming on stream in 2009, and £15 million is for Phase V projects coming on stream in 2010.

11.26 In addition, it is estimated that the enhancement of existing attractions will require an investment of £19.00 million, including the addition of a mini Story Centre at Tullie House.

11.27 A further £6.25 million will be required in other investment, as follows:

- £2.00 million will be allocated to develop four Preview Centres, two in the North West and two in the North East, £1 million invested in the Preview Centres in each region.
- A contribution of £0.5 million will be made to support further development of the National Trail and work on Cycle Paths. This is set against estimates from Sustrans of in excess of £1 million required to set up the new Cycle Paths. Estimates of the cost of extending the National Trail were not available.
- £1 million will be provided for Orientation Points to mark the line of the Wall (£0.3m) and for carriageway signage (£0.7m). The carriageway signage is based on Colin Buchanan Associates' estimates of the number of signs required and HWMP Co-ordination Unit estimates of the cost of each type of sign.

- £2.75 million has been allocated for pre-launch costs, which are capitalised as they will involve developing the Hadrian's Wall brand and image, and as such can be expected to have ongoing benefits in terms of attracting additional visitors into the two regions over a period of years. Of the total amount of £2.75 million, £1 million has been allocated to the post-Major Study cost of progressing the project, to include the development of the site differentiation interpretation strategy.

11.28 In total, the development cost of the entire Hadrian's Wall programme amounts to £56.25 million, of which £31 million will be allocated to developing new attractions along the Wall, £19 million to upgrading existing attractions, and £6.25 million to 'common costs' benefiting all attractions and the wider visitor servicing community, including signage, marketing, visitor interpretation and walking trails and cycle paths.

### ***SITE OPERATING ASSUMPTIONS***

11.29 Site visitor revenues have been estimated using a base year of 2003 attendance and 2004 lead admission prices. Spends per visitor have been estimated using ERA industry standards.

11.30 Attendance growth for each site is shown in the year(s) that the site benefits from capital investment. For the purposes of the model, it is assumed that each project is implemented within a single year, and comes on stream in the following year, with the increase in visitor numbers occurring in the year a new development comes on stream. For example, it is assumed that £3 million is invested in creating a new attraction, including a mini Story Centre, at Maryport in 2005, and that Maryport attracts 50,000 visitors per annum to the new attraction from 2006 onwards.

11.31 In addition, the general five percent growth in visits and attendance that is forecast in the year that the Preview Centres are launched, is assumed to be in response to the increased profile of Hadrian's Wall that will occur as a consequence of this and the marketing campaign associated with it.

11.32 Site specific cost assumptions are based on ERA and Caledonian Economics industry standards for full time employees per visitor, an average cost of £13,274 per annum per FTE, and ERA industry standards for other overhead costs and costs of sale, together with information provided by English Heritage on the current performance of their sites along the Wall. The operating account forecasts for each site reveal that several are likely to require an on-going operating subsidy, as is the case for most heritage sites.

11.33 Non-site specific cost assumptions incorporated within the model are as follows:

- Single organisation costs: A total of £2 million per annum has been estimated to cover incremental costs for a central organisation, of which £1 million represents marketing costs and £1 million administration and other costs. These are very high level cost estimates in the absence of any detail of the central Hadrian's Wall organisation being known. This estimate assumes that around £1 million per annum is already being spent on central

organisations, and this amount could be switched to a new central organisation, increasing the total annual budget of a central Hadrian's Wall organisation by £1 million, however, this extra £1 million is not reflected in the model.

- Transport Hub costs. Colin Buchanan Associates estimate an annual cost of £0.875 million to run the Transport Hub.
- Maintenance of Trails and Cycleways. A contribution of £0.2 million per annum has been estimated to support the costs of running the National Trail and the proposed Cycleways, and to cover the incremental costs of extra walkers/cyclists attracted to Hadrian's Wall by the Major Study programme. This compares to the Countryside Agency's estimate of current costs of £0.38 million per annum (including £0.1 million capital) and Sustrans' estimates of £0.3 million per annum.

## ***EMPLOYMENT MODEL***

11.34 The employment effects of the proposed development programme fall into three categories:

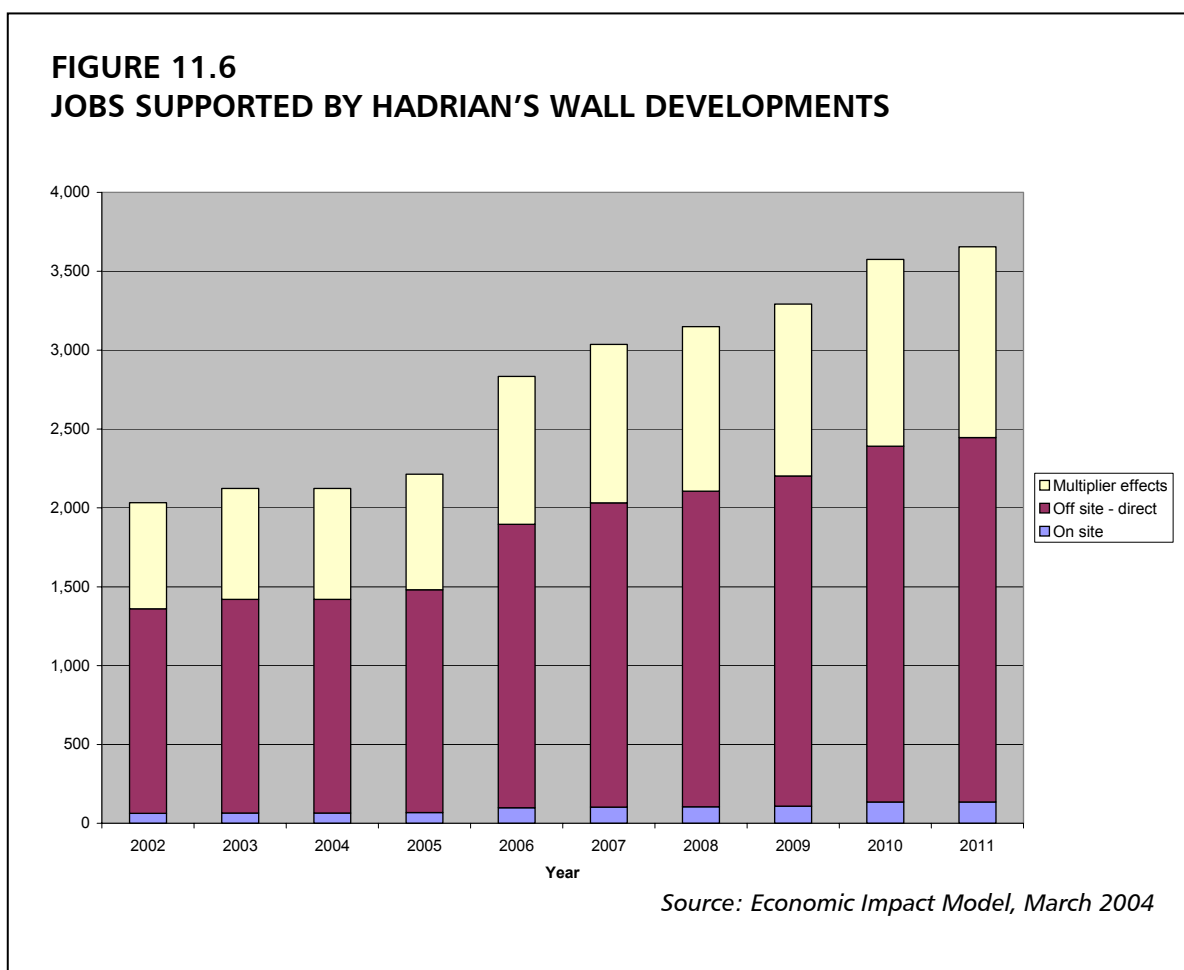
- Additional jobs created on-site by the development programme, as required to serve additional visitors attracted to the Hadrian's Wall sites.
- Additional jobs directly created off-site by the expenditure of visitors drawn into the North West and North East regions by the Hadrian's Wall development. The Wall will act as a magnet in attracting new visitors, whose wider expenditure will then support jobs in the accommodation, catering, retail, transport and leisure services sectors in the regions.
- Additional jobs created by the multiplier effect, under which some of the additional expenditure generated by new visitors is recycled within the region, as entrepreneurs and workers serving tourists spend part of their income on other goods and services produced in the North West and North East. Based on the assumptions used in the model, we estimate that one multiplied job is created for every two jobs directly created by new visitor expenditure.

11.35 Based on industry standards, including evidence recently provided by Caledonian Economics' advisory work in assisting The Alnwick Garden in Northumberland to develop a five-year corporate plan, and a November 1992 study of tourism employment costs undertaken for the British Tourist Authority, we estimate that it would require £33,186 of visitor expenditure to directly support one full-time equivalent job (FTE), and that the average cost per job would equate to 40 percent of turnover per job, or £13,274.

11.36 These estimates are consistent with data provided by STEAM for the North West region. In 2002, STEAM calculated that £640.3 million was directly spent on tourism in the North West (Cumbria Tourist Board) area, and this supported 19,636 FTE jobs, equating to a turnover per job of £32,610. Allowing for inflation since then, we would estimate that turnover per job has risen to approximately £34,000 in the North-West region, and be slightly below that in the North East.

11.37 In addition, we conservatively assume that real wages will rise by one percent per annum over the period 2007 to 2011, reflecting real growth in productivity as a consequence of the Hadrian’s Wall development programme.

11.38 Applying these assumptions, the total number of jobs supported by Hadrian’s Wall is forecast to rise from just over 2,000 in 2002 to 3,655 by 2011.



11.39 Figure 11.6 shows that the total number of jobs supported by the Wall will rise to 3,655 FTEs on completion of the development programme, of which 135 jobs will be provided on-site, 2,310 will be directly supported by visitor expenditure off-site, and 1,210 will be multiplier jobs supported by spending from the incomes of those directly serving the tourists.

11.40 Some of these jobs would exist under a ‘no development’ scenario, as just over 2,000 jobs (FTEs) were estimated to be supported by Hadrian’s Wall in 2002. Thus, the additional jobs created by the development programme represent the difference between the 2002 figures and the 2011 post-development scenario. A total of 1,622 additional jobs are created over this period, of which 73 are on-site, 1,013 off-site and 536 are multiplied. With a total development cost of £56.25 million, this implies that the investment cost per additional job equates to just over £34,680.

- 11.41 These job numbers are based on an assumption that a 'no development' scenario would result in visitor numbers, and hence job numbers, continuing to run at 2003 levels. However, historically attendance levels along Hadrian's Wall have declined. If this decline were to continue over the period reviewed, a further 252 jobs would be lost. These jobs may therefore be regarded as 'safeguarded' by the Development Plan.
- 11.42 Of the total number of additional jobs of 1,622, the model indicates that 174 (10.7 percent) will be created as a result of projects build in the North West region, and 1,448 (89.3 percent) from projects built in the North East region. As noted earlier, the allocation between the two RDAs of additional jobs relating to each development component, is based on the assumption that the extra jobs will all occur in the RDA in which that development component is located.
- 11.43 In reality, the North West region's share of jobs and other economic benefits is likely to be between 15 and 20 percent. 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 benefit more from the projected growth in tourism than is indicated by the model. This is particularly the case currently, due to the higher level of bedspace capacity available in Carlisle than in the rural areas around the Central Section attractions.

### ***ECONOMIC EFFECTS***

- 11.44 In order to calculate the overall economic impact of the development programme, we have applied the economic analysis methodology recommended in the Treasury Green Book on economic appraisal, by comparing the development scenario with a "do nothing" base case generated by 2002 actual figures.
- 11.45 For the purposes of the model, capital works are assumed to be completed within a single calendar year, with the incremental impact on visitor numbers and expenditure occurring in the year following completion of the development. Visit numbers are converted to visitor numbers (which is what drives expenditure off-site) by a visits per trip per visitor conversion factor. This factor increases following completion of the development programme, reflecting a stronger product offer – in other words, following the development, the average visitor will tend to visit an increased number of sites.
- 11.46 Figure 11.7 gives details of the incremental cash flow generated by the development for the period to 2011. The 2011 post-development position is assumed to continue thereafter, and a Net Present Value and economic rate of return has been computed for the periods to 2015, 2020 and 2025.

**FIGURE 11.7  
INCREMENTAL COSTS AND BENEFITS OF THE HADRIAN'S WALL DEVELOPMENT  
PROGRAMME (£000'S)**

Year	2004	2005	2006	2007	2008	2009	2010	2011
Development costs	-4,750	-25,900	-3,700	-1,900	-5,000	-15,000	0	0
Site operating profit	59	63	112	119	110	39	98	70
Central costs	0	-2,000	-3,075	-3,075	-3,075	-3,075	-3,075	-3,075
<b>Net cost</b>	<b>-4,691</b>	<b>-27,837</b>	<b>-6,663</b>	<b>-4,856</b>	<b>-7,965</b>	<b>-18,036</b>	<b>-2,977</b>	<b>-3,005</b>
Incremental visitor expenditure on site	48	134	944	1,087	1,136	1,185	1,965	1,965
Incremental visitor expenditure off-site	819	1,638	6,874	8,673	9,685	10,995	13,247	14,014
Incremental visitor expenditure from non-attraction visitors (off site)	0	0	261	336	369	369	444	444
Total incremental visitor expenditure	867	1,772	8,079	10,096	11,190	12,549	15,656	16,423
<b>Net benefit</b>	<b>-3,824</b>	<b>-26,065</b>	<b>1,416</b>	<b>5,240</b>	<b>3,225</b>	<b>-5,487</b>	<b>12,679</b>	<b>13,418</b>

Source: Economic Impact Model, March 2004

11.47 Discounting the cashflows given in Figure 11.7 back to 2004 gives NPVs and economic rates of return as shown in Figure 11.8.

**FIGURE 11.8  
NPV AND ECONOMIC RATE OF RETURN OF THE HADRIAN'S WALL DEVELOPMENT  
PROGRAMME**

To Year	2015	2020	2050
Net Present Value @ 3.5% real discount rate (£000's)	£32,347	£69,769	£101,279
Economic rate of return ex-multiplier	17.21%	21.37%	22.46%

Source: Economic Impact Model, March 2004

11.48 The NPV and economic rates of return shown in Figure 11.8 are in real terms, before taking account of multiplier effects. With multiplier effects, the economic rate of return to 2025 rises to just over 38 percent in real terms. The outputs calculated in Figure 11.8 represent high returns in economic terms. A typical hurdle real rate of return for a project of this type, taking account of the risks associated with it, would be approximately 15 percent. The hurdle rate represents the minimum rate that a project would need to exceed if it was to be

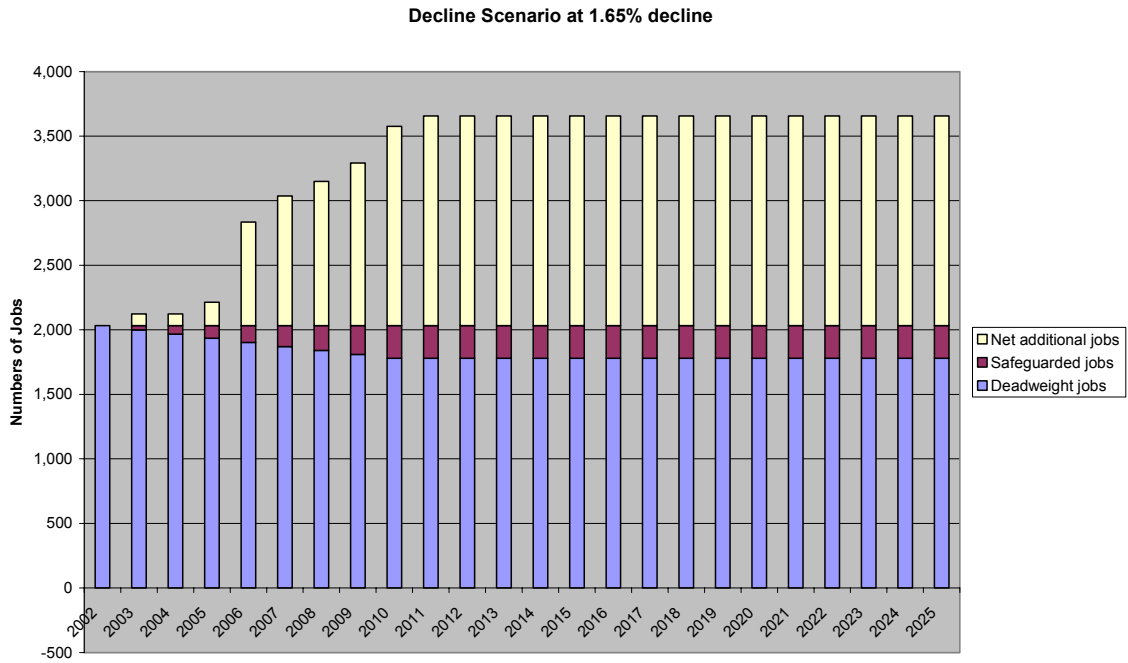
worthwhile implementing, given the possible risks of some shortfall in benefits or overrun in costs compared to forecasts. As the proposed Hadrian's Wall development plan comfortably exceeds this hurdle rate, the conclusion would be that it would be economically worthwhile to implement the plan.

- 11.49 At this stage, it is not possible to realistically separate the economic rate of return for the North West and North East regions. The reason is that many of the costs incurred in the development programme are joint costs – for example marketing costs – that are difficult, at a top line strategic level, to apportion between the two areas.

### ***DECLINE SCENARIO***

- 11.50 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 visitors to three of the main sites in the Central Section of Hadrian's Wall has fallen by an average of approximately 1.65 percent per annum.
- 11.51 Under one scenario tested for the project, it was assumed that this trend would continue and hence that the 'do nothing' option would be associated with a continuing 1.65 percent decline in visitor numbers and expenditure per annum until 2010. Were such a decline to take place, there would be a reduction in the number of jobs currently supported by Hadrian's Wall. These jobs are regarded as jobs which are 'safeguarded' through the Major Study development plan, and as such would also be included in the calculation of the economic rate of return. In this 'decline scenario', the economic rate of return of the Major Study development plan with multiplier effects – defined as the difference between the development plan and 'do nothing' (i.e. with decline) option – rises to almost 56 percent in real terms. Figure 11.9 shows that the number of safeguarded jobs over time would comprise 252 of the 3,655 jobs in place from 2011.
- 11.52 In reality, it would be unlikely that the rate of decline in visitor numbers would continue at 1.65 percent per annum, but it is quite possible that a cumulative decline of between 0.5 and 1.0 percent could be experienced. In such a scenario, making a comparison with an average decline in visitor numbers and real expenditure of say 0.8 percent per year through to 2010, the economic rate of return on the proposed Major Study development plan would be just over 45 percent in real terms.

**FIGURE 11.9  
THE DECLINE SCENARIO**



Source: Economic Impact Model, March 2004

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## **12. BROADER IMPACT OF STUDY**

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### ***INTRODUCTION***

12.1 The growth objectives of the Major Study need to be achieved in a sustainable manner. The ability to achieve this has been reviewed through separate assessments of the impact of the strategy on the operation of Hadrian's Wall WHS, the communities within the Hadrian's Wall corridor, the environment within the WHS and transport issues relating to the WHS. The key findings of these reviews are set out below.

### ***OPERATIONS***

12.2 One of the benefits of developing a single management unit is that all the main functions of managing a site with both public realm and commercial interests at stake are co-ordinated within one entity. Operationally this means that activities and decisions are undertaken with a view to their impact in all the other streams of management accountability. This has not been the case in the past, for instance the separate activities of the HWTP and HWCU have been described as working to agendas that lacked complementarity, resulting in a lack of joined-up thinking.

12.3 In future the following areas of responsibility should be within one senior management team:

- Achieving revenue targets, and therefore the marketing and central ticketing sales.
- Financial management of grants, costs and budgets.
- Conservation management.
- Development of new products.
- Reporting to Stakeholders/grant bodies.
- Community liaison.

### ***Potential Conflicts***

12.4 There may be some discussions regarding how the new organisation fits in with the changing structure of tourism support organisations in the two RDA regions. While Tourist Boards are already in place in the Northwest, in the Northeast the new structures are still in negotiation for their formation and may not be in place until later in 2004 or perhaps 2005.

### ***COMMUNITY***

12.5 The consultation process during the development of the strategy for the Major Study has mainly been with key stakeholders. These were through individual interviews during the fact-finding stage and through workshops to test the draft

Vision. Once the proposals were reaching their final formation, after evaluation of the transport, environmental and economic impacts, presentations to a wider constituency from the Hadrian's Wall community took place in mid-February.

- 12.6 Part of the remit of HWTP has been to address the needs of the communities in the Hadrian's Wall corridor. In fact, community groups have been formed and these have played a role in the evolution of decisions in the co-ordinated management of the Wall to date.
- 12.7 As the Major Study moves from the strategic to the implementation stage it is right that communities should be consulted on matters which affect their way of life and their property. These local issues need to be balanced with the wider community benefit of sustainable economic growth. There will need to be a wider community consultation in the Implementation programme for the Major Study in 2004/5.

## ***KEY FINDINGS OF ENVIRONMENTAL ASSESSMENT***

### ***Introduction***

- 12.8 Hadrian's Wall is as an outstanding example of human achievement and has been inscribed as a World Heritage Site (WHS) to reflect its status as the best-preserved and most complex surviving Roman Frontier. Its environs are also extremely diverse and highly important. The area around the WHS contains many natural, cultural heritage and landscape designations. These highlight the area's specialness and significance and in many places outside the major urban areas the environs of the WHS are considered to be highly sensitive to change. Therefore all change within and around the Wall would need to be undertaken with due consideration of the outstanding universal value of the Wall, the sensitivity and significance of the other environmental designations and the area's varied landscape character.
- 12.9 The Major Study has been developed in an iterative manner with an ongoing programme of environmental assessment and analysis paralleling and informing the study. This approach has enabled the project team to consider and balance environmental issues and concerns with economic and visitor experience requirements at all stages in the project. The Strategic Environmental Assessment (SEA) presented in Appendix 9 represents the formal reporting stage of that process. A summary of the key findings is set out below.
- 12.10 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.

### ***Summary SEA***

- 12.11 This section outlines the methodology behind the SEA, discusses the potential environmental impacts and proposes measures that would help mitigate adverse impacts and realise environmental benefits. The full SEA includes extensive detail

on the environmental baseline, environmental planning policy context and further details on the elements summarised below.

## Methodology

12.12 The SEA has been developed in line with current guidance regarding SEA and Environmental Impact Assessment (EIA). The SEA was undertaken in a staged manner, as outlined below (see Appendix 10, paragraph 1.4.1 for more detail):

- *Stage 1: Scoping Assessment* – The scoping assessment identified the key *environmental components* that could be impacted on by the proposals and the *types of the changes* that may give rise to those impacts. The key environmental components were identified as *Cultural Heritage, Landscape, Nature Conservation, Water, Geology and Soils*. The key types of change that may give rise to impacts were identified as *construction, operation, increased visitor numbers and associated impacts* (e.g. the need for additional hotels and other infrastructure to accommodate visitors).
- *Stage 2: Policy Context Review* – As part of the SEA the international, national, regional and local environmental planning policy context was reviewed. This identified key policy issues and constraints.
- *Stage 3: Baseline Assessment* – This stage outlined the baseline information for the environmental components, with a particular focus on areas where major physical change was proposed, namely The Central Area around Haltwhistle, and the Western areas of Ravenglass and Maryport. The stage also identified current environmental issues.
- *Stage 4: Environmental Assessment* – Using the baseline data and information on the proposals the SEA identified the key environmental issues for each stage of the proposals and identified possible mitigation measures for potential impacts.
- *Stage 5: Next Steps* – Drawing on the results of the Environmental Assessment the SEA identified possible mitigation and procedural measures to accompany the development and implementation of the proposals to ensure that potential environmental effects are identified, mitigated and managed.

## Current Issues

12.13 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 included:

- 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.
- Impact of land management regimes on archaeological sites (both positive and negative).
- Impact of new and existing developments on the setting of the WHS.

- Possible impacts on the landscape and ecological resource stemming from climate change.

### ***Major Study Proposals***

12.14 Where possible the Major Study has sought to address these issues to ensure that proposals do not exacerbate the issues. It is also anticipated that the implementation of the Major Study would deliver conservation benefits for the World Heritage Site by:

- Providing additional income from visitors that would allow individual sites / attractions to invest in the management and conservation of their own assets;
- Merging the HWTP and HWCU within the HWT to form a stronger, more integrated body that would be better placed to attract external funding for (and deliver) conservation projects across the entire WHS;
- Ensuring that effective "monitor and manage" regimes are developed across the WHS; and

12.15 Funding conservation works that form an inherent aspect of any development work within the WHS.

### **Environmental Impacts and Benefits**

12.16 The SEA examined potential impacts stemming from construction, operation, increased visitor numbers and associated impacts arising with the six phases of development. The following summarises the results of that assessment for each phase of development.

#### *Phase I*

12.17 The proposed locations for the Preview Centres would result in no construction or operational impacts. The Preview Centres would result in a small increase in visitor numbers in Phase I. This increase would require monitoring and management on a site-by-site basis to ensure that localised impacts on environmental components are identified and mitigated. It is anticipated that this could be achieved within the current management regimes.

12.18 In terms of associated impacts arising from the need to service the increased visitor numbers, these are likely to be relatively minor and should be controllable through existing planning and environmental management regimes.

#### *Phase II*

12.19 Phase II constitutes the largest single development phase of the entire proposals and poses a number of environmental issues. The following examines these issues in relation to the four key product development components.

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Enhancement of Housesteads, Chesters, Vindolanda and the Roman Army Museum

- 12.20 The exact details of the proposed changes remain to be confirmed. All of the sites are highly sensitive in cultural heritage and landscape terms. There are also ecological issues in the areas around some of the sites.
- 12.21 It is currently understood that new construction would be relatively limited at the sites and the implementation of the Haltwhistle Hub (see below) should remove the need for expansion of parking facilities at Housesteads. Care would be required to ensure that any construction activity does not adversely impact on cultural heritage or ecological features. The design of the proposed changes would need to reflect the landscape sensitivities of the area and in some cases the Northumberland National Park. In operational terms no adverse impacts are currently predicted.
- 12.22 The sites would all experience a substantial increase in visitors. This may present localised on-site issues regarding the erosion of archaeological features. More significant is the potential for off-site impacts (particularly at Housesteads) with visitors potentially increasing erosion pressures on archaeological, ecological and landscape features. This would require careful management to reduce adverse impacts. The emerging Limits of Acceptable Change (LAC) model should prove a useful tool in ensuring that damage is adequately monitored. However, robust strategies for addressing potential impacts are required to support the LAC approach. These could include for example the temporary closure of archaeological sites, diversion of footpaths and establishment of 'parallel' paths to relieve pressure on the National Trail in key areas.
- 12.23 The proposed changes are on their own unlikely to result in significant associated impacts arising from the development of new tourism infrastructure. Possible impacts should be controllable through existing planning and environmental management regimes.

The Haltwhistle Hub

- 12.24 The proposed Haltwhistle Story Centre with transport hub and car parking is the largest single construction element proposed for the Central Section. The scale and location for the development remains to be determined but the construction of such a development has the potential to impact on a range of environmental components including cultural heritage resources, ecological habitats and species, water resources and the landscape character of the area.
- 12.25 The design and construction process would need to consider a range of options and approaches to the development to ensure that adverse environmental impacts are minimised and mitigated. The development may require formal Environmental Impact Assessment. Given the relatively low environmental sensitivity of some areas around Haltwhistle it should be possible, with a suitable level of project planning and environmental assessment, to develop the proposal with, at most, only minor adverse impacts.

- 12.26 The operation of the associated traffic management regime has the potential to deliver substantial environmental benefits for the Hadrian's Wall WHS and the Northumberland National Park. The reduction in traffic along the Military Road and the removal of the need to expand car parking in the Central Section should deliver environmental benefits for the landscape, water, soil, cultural heritage and ecological resources of the area.
- 12.27 The operation of the system may have some localised adverse impacts on environmental resources in the vicinity of Haltwhistle. The choice of route for the proposed transport links and the nature of the transport system are critical in minimising any potential adverse impacts. A formal options appraisal process to examine the location of the proposed transport hub, routes to and from the attractions and the nature of the transportation is recommended to ensure that the environmental benefits are maximised and adverse impacts minimised.
- 12.28 The proposed Story Centre and Hub would significantly increase visitor numbers to the area. This increase would place considerable pressure on the sensitive environmental resources of the Central Section in particular the WHS (and other cultural heritage assets), ecological habitats, soil resources and the landscape character of the area. The proposed increases have the potential to erode the archaeological remains of the WHS, damage designated ecological sites and habitats and harm the landscape character of the area, an integrated and coordinated management approach would be required to minimise these impacts.
- 12.29 Robust measures are required to monitor and manage the growth of visitor numbers and ensure that the proposals can be implemented in a sustainable manner. Initial thoughts from site managers would indicate that the discrete heritage sites can probably, with enhanced management regimes, accommodate the increased visitor numbers. The wider landscape would require further monitoring to determine carry capacity. However, the development of a supporting path network, secondary trails to relieve the National Trail and increased expenditure on maintenance and management should enable the proposed visitor increases to be accommodated within the wider landscape.
- 12.30 The proposals could also create a number of associated impacts stemming from the need to substantially upgrade and increase tourism infrastructure in the area, particularly in and around Haltwhistle. This development would need to be assessed on a case-by-case basis through the planning system to minimise potential environmental impacts. The cumulative effects of such changes would also require monitoring, in particular with regard to: growth in traffic levels in and around Haltwhistle; changes in townscape and landscape character; and impacts on ecological, water, soil and cultural heritage resources.

#### Development of An Attraction at Maryport

- 12.31 Details on the location, scale and nature of the proposed attraction at Maryport remain to be determined. The area in and around Maryport contains a number of highly sensitive environmental designations, including a SSSI in the harbour. The construction of the proposed development has the potential to impact on these designations as well as alter the character and form of the historic town of

Maryport. Through appropriate design and construction methods these impacts should be mitigatable and any residual effects should be minimised.

- 12.32 In terms of operation the location of the attraction would be fundamental to ensuring that additional traffic and visitor numbers do not significantly harm the character and fabric of local environmental assets. Although the proposed attraction is forecast to attract c.50,000 visits per annum there are likely to be few visitor related impacts on local environmental assets that cannot be addressed through appropriate levels of management. However, current management regimes may need to be enhanced to ensure that impacts are identified and managed. The growth of the attraction may also increase visitor numbers to the Senhouse Museum and Roman fortlet. This key component of the WHS would require careful management to ensure that adverse impacts are minimised.
- 12.33 The growth of the attraction would help drive the development of tourism infrastructure in the town and local area. The centre of Maryport has a distinct and recognisable historic fabric and character and has been designated as a Conservation Area. The development of tourism infrastructure would need to be managed through the planning process to ensure that developments reflect the character and setting of the historic core and other assets. Cumulative impacts on water quality, ecological habitats and soils would also need to be monitored and mitigated through appropriate design responses.

#### Establishment of Orientation Points

- 12.34 The design of orientation points remains to be determined. For the purposes of this assessment it is assumed that they are simple structures with little or no land take and ground impact. Given this assumption it is unlikely that there would be any significant construction impacts. However, the style and design of the points would need to reflect the variable landscape character and setting of the WHS.
- 12.35 Operationally there may be issues with soil poaching and erosion around the points as visitors are likely to congregate around them. The location of each point would have to be carefully determined to prevent erosion of archaeological and ecological sites. It is not currently anticipated that there would be other types of impact associated with the points.

#### Phase III

- 12.36 The Phase III proposals can effectively be divided into two sections: changes in Carlisle related to the creation of a mini-story centre and the enhancement of the remaining attractions in the Central Section namely Birdoswald and Corbridge.

#### Attraction Upgrades in the Central Section

- 12.37 The exact details of the proposed changes remain to be confirmed but new construction is assumed to be relatively limited. All of the sites are generally highly sensitive in cultural heritage and landscape terms and there are significant ecological designations around the sites. Care would be required to ensure that

construction activity would not adversely impact on cultural heritage or ecological features. The design of the proposed changes would need to reflect the landscape character of the area.

- 12.38 The sites would experience an increase in visitors. This is likely to present localised on-site issues regarding the erosion of archaeological features. There is also the potential for off-site erosion with the additional visitors potentially increasing erosion pressures on archaeological, ecological, soil and landscape features. As with proposed changes at Housesteads and Chesters these impacts would require careful management to ensure that no significant adverse impacts occur.
- 12.39 The proposed changes are, in conjunction with Phase II schemes, likely to result in some associated impacts due to the need for additional tourism infrastructure. Possible impacts should be controllable through existing planning and environmental management regimes; although ongoing cumulative environmental monitoring may be required to ensure that small incremental impacts do not degrade key environmental assets and the landscape character of the area.

#### Carlisle - Story Centre

- 12.40 Given the robust urban location of the proposed Story Centre and the fact that its development would be controlled by town and country planning procedures no significant environmental impacts are currently predicted.

#### Phase IV

- 12.41 The proposed Story Centre at the new Newcastle Museum would be developed within a robust urban environment and Segedunum and Arbeia are two discrete well-managed archaeological sites. The Story Centre at the proposed new Museum of the North would be subject to town planning and listed building consent procedures. This should ensure that the development is implemented without significant adverse environmental impacts. In operational and visitor impact terms no adverse impacts are anticipated as Newcastle's urban environment is sufficiently robust to accommodate the proposed increases in visitor numbers.
- 12.42 Currently there are no details for the proposed enhancements at the Segedunum and Arbeia sites; however changes are likely to be relatively modest in terms of scale of construction and operation. The two sites are significant aspects of the WHS and proposed changes would need to ensure that no degradation of the archaeological fabric occurs. With respect to other environmental components, few designations have been identified in the vicinity of the sites and the proposals are unlikely to have any impact on these. The forecasted increases in visitor numbers to the sites should be achievable without adverse impacts if current management and monitoring regimes are maintained. It is unlikely that the proposed increases would have any wider impacts.
- 12.43 The growth in visitor numbers for the Newcastle and Gateshead area is unlikely to have a major impact on the development of associated tourism infrastructure.

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Phase V

- 12.44 The Phase V proposals comprise two major elements: the development of a new attraction focussed on a reconstruction in the Central Section and a new attraction at Ravenglass.

Reconstruction in the Central Section

- 12.45 The location, extent and scale of the proposed reconstruction remains to be confirmed. The proposed development has a high potential to impact on sensitive archaeological and ecological resources and the options for its location would have to be carefully considered. Care will also be required to conserve the landscape character of the area. In operational terms the site would form a key component of the Central Section visitor experience and may have an impact on the operation of the transport system to and from the hub.
- 12.46 Although, due to insufficient data, it is not possible at this stage to accurately predict whether the wider WHS and landscape could accommodate the predicted increases in visitors, the implementation of the proposed "monitor and manage" regimes across the WHS by the HWT and RDAs should allow the scheme to be implemented without significant adverse impacts. The enhanced and integrated management regimes would also allow the physical carrying capacity of different areas to be increased and this coupled with a flexible approach to the implementation of the Major Study should deliver substantial environmental benefits, with minimal adverse impacts.
- 12.47 The proposed development has been predicted to involve a substantial increase in visitor numbers to the area. This increase is likely to result in localised off-site impacts with visitors potentially increasing erosion pressures on archaeological, soil, ecological and landscape features. The feasibility of the increase in visitor numbers would need to be tested prior to implementation of the proposals to ensure that the area has the carrying capacity to accommodate these increases. This assessment would need to be based on data being currently collected and additional data gathered through enhanced monitoring and management procedures implemented during Phases I to IV. At this stage it is not possible to accurately predict whether the wider WHS and landscape could accommodate the predicted increases in visitors without significant environmental impacts. However, enhanced and integrated management measures would increase the carrying capacity of the area.
- 12.48 The predicted visitor numbers could also see a significant increase in the need for additional tourism infrastructure. The delivery of this infrastructure would need to be undertaken in a co-ordinated manner to reduce environmental impacts.

Ravenglass

- 12.49 The area around Ravenglass has been identified as having landscape, ecological and cultural heritage sensitivities. Any major new development in the area has the potential to impact on these environmental components. The exact scale, nature and location of the proposed attraction remains to be determined. With

an appropriate location and design it may be possible to implement the proposed construction without significant adverse environmental impacts.

- 12.50 The predicted increase in visitor numbers to the area is relatively significant compared to current visitation levels, this may present issues with localised impacts to environmental resources. Associated impacts due to the need for increased tourism infrastructure also have the potential to adversely impact on environmental assets. These potential impacts would require further detailed analysis as part of the options appraisal / feasibility study process.

### **Next Steps**

- 12.51 The Hadrian's Wall WHS and with its associated landscapes contains a wealth of highly sensitive environmental resources. The implementation of the proposals will need to be undertaken in a sensitive manner that reflects the need to conserve these resources, maintain the diverse and rich landscape character of the area and preserve water quality across the area. It is therefore recommended that prior to and during the implementation of the proposals steps are taken in the areas of Building Design and Management, Project Planning and Environmental Assessment, and Management and Monitoring Regimes to ensure that the proposals are effectively implemented.

### **Building Design and Maintenance**

- 12.52 To mitigate long-term impacts on the environment and reduce energy consumption it is recommended that all major new constructions are developed in accordance with the Green Code for Architecture (Towards More Sustainable Construction: Green Guide for Managers on the Government Estate – DEFRA 1999). It is also recommended that new buildings and conversions of existing buildings are designed to achieve a high score under a bespoke Building Research Establishment Environment Assessment Method. Other relevant guidance should also be applied to ensure that the proposed buildings achieve the highest practicable levels of environmental sustainability.

### **Project Planning and Environmental Assessment**

- 12.53 Key to ensuring the proposals are delivered with a minimal level of environmental impact is the instigation of a robust and transparent Project Planning and Environmental Assessment process. Within this process a number of key elements have been identified including:
- The identification of a *single body / individual* to *co-ordinate* the environmental assessment processes and *champion* the need to conserve and protect all environmental components.
  - *Options Appraisals and Feasibility Studies* for all major construction and operation projects (e.g. Haltwhistle Hub). The studies would include an in-build environmental assessment process.
  - Iterative formal *Environmental Impact Assessments* for the major construction and operation elements of the proposals.

- Ongoing *cumulative environmental impact assessment* to assess the overall impact of the proposals, when taken together, on key environmental components such as the WHS, National Park, AONB and ecological designations.

### **Management and Monitoring Regimes**

12.54 The predicted increases in visitor numbers will present new challenges for the management of the WHS and associated environmental resources. These challenges need to be approached in an integrated and co-ordinated manner to ensure that environmental impacts are adequately monitored, identified and addressed. Key components in this would include:

- The establishment of a *single management body* to guide the development and management of the Hadrian's Wall WHS and National Trail.
- The preparation of a robust and agreed *Conservation Plan / Framework* for the entirety of the WHS to support the WHS Management Plan.
- The preparation of *Limits of Acceptable Change Agreements* for the entirety of the WHS.
- The establishment of a *formal monitoring process* to identify visitor related impacts on the WHS and landscape, soil and ecological resources of the wider area using agreed indicators.
- The preparation of *agreed management strategies* to address particular types of impacts and potential conflicts e.g. the creation of an additional parallel alignment for the National Trail to allow for temporary closure and diversion of the Trail to manage erosion.
- The development of a *cumulative impact assessment model* to monitor potential environmental impacts associated with the development of new tourism infrastructure e.g. hotels.

### **Conclusion**

12.55 Due to the environmental sensitivity of the WHS and associated areas the predicted growth in visitor numbers and the proposed developments pose a number of environmental issues. 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 Area.

12.56 To achieve the proposed growth in visitor numbers and implement the proposed development without significant environmental impacts it would be necessary to implement 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 would also ensure that environmental benefits are realised at every opportunity.

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## **KEY FINDINGS OF TRANSPORT ASSESSMENT**

### ***Introduction***

- 12.57 A report has been prepared as part of the Hadrian's Wall Major Study to consider the transportation issues in relation to increasing visitor revenues in a sustainable manner and to assess potential sustainable transport initiatives which would enable this to be achieved. A summary of the findings follows. The full report is set out in Appendix 10.

### ***Current Situation***

- 12.58 Any increase in visitor numbers will obviously have an impact upon the surrounding area, potentially in both a positive and negative way. It is therefore important that the potential increase in visitor numbers is managed to achieve an acceptable balance between the environment, for those living and working in the area while maintaining and improving the economic viability of Hadrian's Wall.
- 12.59 Key to the overall study, and to many of the sustainability issues, is the need to improve visitors' awareness that Hadrian's Wall is a singular entity rather than a series of individual attractions. With visitor awareness improved the potential exists to encourage multiple visits thereby spreading the impact of visitor numbers.

### ***Access***

- 12.60 On the whole Hadrian's Wall is generally already reasonably well served by sustainable transport modes. Almost the full length of the wall is accessible through the use of the Hadrian's Wall bus, AD 122. Access by rail is achievable on both a national and local level with stations at Hexham, Haydon Bridge and Haltwhistle, both of which lie in close proximity to the wall. The west coast is served via Carlisle from which access to Senhouse Museum and Tullie House can be achieved.
- 12.61 Walkers and cyclists are also well catered for through provision of both the Hadrian's Wall Path National Trail and the Sustrans National Cycle Route 72. These facilities provide access for walkers and cyclists along virtually the complete length of the wall.
- 12.62 This present study has shown that both the strategic and local road network around Hadrian's Wall is generally operating within theoretical capacities. Although there are currently issues with traffic on the A69(T) at Haydon Bridge, a by-pass scheme for this section of the A69(T) is progressing. As recently as December 2003 a preferred alignment was determined for the by-pass via a public consultation exercise. The preferred route is now firmly established and protected from any future planning development.
- 12.63 The drafts roads orders are currently being prepared and subject to formal objections, and possibly a Public Inquiry. The Secretary of State for Transport will

confirm the final progression of the scheme and the statutory orders. On this basis it is reasonable to assume that a Haydon Bridge by-pass will be in place within the next ten years.

### **Signage**

- 12.64 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. This includes those in the west but is especially an issue in the Central Section.
- 12.65 It is clear that there is at present no formal structure or hierarchy to the signage regime. This is exacerbated as a result of the various local and national government bodies responsible for various sections of local and trunk road network.
- 12.66 It would appear that traffic signing has been developed in a piecemeal fashion over the years as development of Hadrian's Wall sites has taken place. There are a number of locations where the proliferation of signs is such that much of the information being conveyed to drivers and others is both confusing and over-complicated. The general quality of signs is lower than should be expected in one of Britain's premier tourist attraction destinations. This situation needs to be addressed.

### ***Assessment of Major Study Proposals***

- 12.67 A number of sustainable transport initiatives were considered as part of transport measures associated with the Major Study. The development of a route hierarchy for the road network around Hadrian's Wall including a formal signing strategy was considered.
- 12.68 Technology currently exists which would enable a signing strategy to be developed which would encompass the requirements of all the local and national government bodies responsible for signage along the length of the wall.

### **Central Section Story Centre and Transport Hub**

- 12.69 The development of a transport hub at a key location on the route of Hadrian's Wall was assessed. Two sites were initially considered, Hexham and Haltwhistle, and the advantage and disadvantage of both assessed.
- 12.70 Considering the level of service required in order to make a facility attractive to visitors and also the distances involved it was concluded that Haltwhistle was the most appropriate location for the transport hub. The provision of the transport hub at Haltwhistle would potentially reduce the overall numbers of individual vehicle movements through use of the bus facility. This would in turn have environmental benefits to the local area through reduced traffic volumes.
- 12.71 Based upon a transport hub at Haltwhistle various bus service options were considered and costed. Although there are a vast number of potential routes and service options for the hub bus service for purposes of simplicity two options were considered. These involved a 15 minute frequent service to all the central

sites (Birdoswald, Roman Army Musuem, Vindolanda, Housesteads and Chesters) and an alternative proposal for a 15 minute frequent service to the three central sites (Roman Army Musuem, Vindolanda and Housesteads and a 30 minutes service to the eastern and western sites (Birdoswald and Chesters).

- 12.72 When the cost of the existing AD122 service is compared with the potential hub services cost, covering the same sites, it can be seen that they are very similar.
- 12.73 Obviously in order to make the new bus services and the transport hub a sustainable facility there needs to be sufficient revenue generated to finance the operation. At this stage of the study the cost modelling of the facility has not gone into major detail. However, it can be seen from the numbers above that in order to break even on the operating cost of the new bus service in the region of 240,000 to 290,000 passengers would be required based upon a £3.00 fare. When it is considered that the 2010 attendance projection for the hub are in the region of 250,000 it can be seen that this scheme has some potential for success.
- 12.74 In order to achieve the levels of patronage required to make the new service financially justifiable the new bus service will need to become part of the Hadrian's Wall experience in its own right.

### **Walkers and Cyclists**

- 12.75 As part of the overall transport initiatives enhancements to the existing walking and cycling facilities would be required to encourage their continued use and to encourage linked visits to closely associated wall attractions which do not rely upon the private car.

### **Signage**

- 12.76 High quality information boards and comprehensive signage would encourage multiple site visits helping to reduce the overall impact of the potential increase visitor numbers encouraging a sustainable move away from the reliance on the private car.

### **Recommendations**

- 12.77 Arising from this study it is recommended that the clients, namely One NorthEast and NWDA, continues with the development of the following initiatives to encourage the sustainable development of Hadrian's Wall:

#### **Signing and Route Hierarchy**

- A detailed inventory of existing signs both on the strategic and local highway network.
- Develop and confirm the route hierarchy through discussions between all parties involved taking on board the work already undertaken by English Heritage.
- Develop a detailed signing strategy based on the agreed route hierarchy which will address signage from the strategic routes to appropriate tertiary

and secondary routes in order to minimise the environmental impacts of traffic and to maximise linked trips along Hadrian's Wall.

- In developing the strategy full use should be made of current signage technology to enable signs to be augmented and updated in a consistent manner.

### **Traffic Calming**

- Further investigation of potential villages, key intersections, pedestrian/cycle conflicts and attraction sites for traffic calming and treatment to reduce the impact of vehicles. This investigation is likely to focus on the B6318 Military Road and key secondary road crossings along its length.

### **Cycling and Walking**

- The provision of information boards at attractions which show existing walking and cycling trails in relation to other nearby attractions.
- The development of a walking and cycling signing strategy for Hadrian's Wall.
- Upgrading of existing routes along Hadrian's Wall and facilities at the attractions.

### **Transport Hub**

- Detailed consideration of the exact location for the transport hub in relation to access from the A69(T), proximity to existing transport facilities and the availability of a site in and around Haltwhistle.
- A review of the service options presented here involving potential operators. This review will need to address vehicle types, service levels, routes, viability and fare structures.
- Investigate potential funding sources for the transport hub and services.

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## 13. NEXT STEPS POST MAJOR STUDY

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### *INTRODUCTION*

- 13.1 The following section sets out the key steps required to progress the proposals and recommendations made by the Major Study. These steps cover the period between the completion of the Major Study and the launch of Phase I of the development programme.

### *KEY NEXT STEPS*

#### *New Organisation*

- 13.2 The findings of the Major Study indicate that a change in the organisational structure of the Wall is required in order for Hadrian's Wall to achieve the desired step change in its contribution towards tourism revenues in the North of England.
- 13.3 The starting point for the implementation of the recommendations of the Major Study is therefore the formation of a new central organisation capable of delivering the agreed Vision. To achieve this will require agreement on the new organisation's structure and the extent of its remit. This will also require buy-in to the Major Study recommendations from the main bodies currently responsible for managing and operating Hadrian's Wall, who may form the members of the new central organisation.
- 13.4 Once the remit of the new central organisation has been agreed, priorities will need to be set and the relevant staff employed, or interim consultant capacity sourced, in order to progress the areas of priority. Key personnel at the inception of the central organisation will be the development implementation resource, which needs to be capable of managing the development plan programme and sourcing funding for the plan, and the strategic marketing and communications resource.
- 13.5 The development of a change management strategy will be important in facilitating stakeholder buy-in to essential changes occurring within stakeholder organisations as a result of the new central organisation.

#### *Priorities*

- 13.6 The main priorities of the new organisation, and of the two RDA's in the interim period, whilst the organisation is being set up, are likely to be as follows:
- The development of a physical master plan and concept design for the 'Greatest Roman Frontier'. To include, a story master plan to connect all aspects of the visitor experience into the 'Greatest Roman Frontier', together with defined concepts for the development plan components, the identification of specific sites for each of the development plan components,

detailed feasibility studies and design studies for each site, and preliminary site specific capital costings.

- The creation of the 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 and content strategy.
- The progression of development plan components affected by other grant giving bodies' deadlines, such as the ERDF bid components. It is key that the creative concept proposed in such bids is consistent with the overall development plan (as defined by the two priorities set out above).
- The establishment of a funding plan for the development plan.

13.7 Follow-up activities will involve the following and will also need to be implemented quickly:

- The creation of a core marketing resource, to support the strategic resource already implemented, to develop the brand, to design and implement the Preview Centres, and to achieve the Phase 0 marketing programme.
- Finalising the establishment of the new central organisation, find premises and recruit permanent posts.
- Conducting a full environmental impact study, as exact locations for development components are finalised, and agree environmental monitoring procedures and indicators.
- Conducting a detailed transport assessment, as exact locations for development components are finalised, in particular for the Central Section Transport Hub, and the development of a signing and route hierarchy for road signage.
- Finalising the capital budget, revenue budget, funding strategy and bid programme.

## ***TIMING ISSUES***

13.8 A key factor driving the timing of the next steps is the requirement for all projects in the current ERDF programme to have been approved, and for building contracts to have been let, by the end of 2006. It is important that the submissions for funding are based on concept designs that are consistent with the overall development plan. It is for this reason that the development of the physical master plan and the creation of the Interpretation Co-ordination Group, responsible for the differentiation of the sites, are shown above as priorities.

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## **14. SUGGESTED TARGETS AND MEASURES**

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### ***INTRODUCTION***

- 14.1 The following section sets out suggestions for measuring the success of the Major Study proposals. This will form an important check on whether or not the implementation of the development plan is achieving the projected growth in visitor revenues to the North of England.
- 14.2 If comparisons of actual performance against target performance indicate that revenues are not growing as anticipated, then it will be important to understand the reasons behind this, and whether they are to do with changes in external factors, outside the control of the new Hadrian's Wall organisation, or to do with factors that are under the control of the organisation.
- 14.3 Phase V of the development plan, a new attraction at Ravenglass and reconstruction in the Central Section, is recommended subject to the successful implementation of Phases I to IV. In particular the performance of the proposed new attraction at Maryport will be key in deciding whether or not to go ahead with the Ravenglass development. Regular monitoring of the Maryport development performance against its targets will be necessary to support this decision.

### ***MEASUREMENT TOOLS***

- 14.4 A key tool in this measurement is the Economic Impact Study. This sets out the consultant team's estimates for current performance, in terms of visit and visitor numbers, expenditure by visitors, jobs relating to the Wall visitor experience and economic rate of return.
- 14.5 Estimates are provided in the Economic Impact Study for 2005 (based on the assumption that Phase I of the plan is implemented in 2005) through to 2011. These estimates should form the targets for actual performance to be compared to. The targets should be adjusted as the development programme is evolved, to reflect the greater detail that will become available as individual site reviews and feasibility studies are completed.
- 14.6 A key tool in measuring current performance will be an audit of visitors to the Wall. This should be based on the MEW Visitor Audit run from Easter through to October 2003, but be adjusted to ensure that it monitors the key measurements required, for example the number of visits to sites per visitor and the average expenditure by visitors. Actual attendance at the individual sites and counts from the Hadrian's Wall National Trail will also be helpful in monitoring performance.
- 14.7 The detailed environmental impact study and transport assessments, which should be completed once the specific locations for new developments have

been determined, will provide further targets and measures that will be important for monitoring the on-going impact of Major Study developments.

## **15. APPENDICES**

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- A.1. Fact Finding Stage: Feedback from stakeholder interviews
- A.2. Fact Finding Stage: MEW Research – Visitor Audit and Current Image Research
- A.3. Review of Comparable Developments
- A.4. Visioning Stage: Visioning Programme Briefing Paper
- A.5. Visioning Stage: Brand Vista – Output from Visioning Programme
- A.6. Visioning Stage: Stakeholder Visioning Workshops
- A.7. Visioning Stage: MEW Research – Consumer Positioning Testing
- A.8. Strategy Stage: Mallam & Co. - Organisational Review
- A.9. Testing Strategy Stage: Caledonian Economics & SJA – Economic Impact Study
- A.10. Testing Strategy Stage: Chris Blandford Associates – SEA
- A.11. Testing Strategy Stage: Colin Buchanan & Partners – Transport Assessment