

# HADRIAN'S WALL 10-YEAR INVESTMENT PROGRAMME FRAMEWORK

REPORT FOR HADRIAN'S WALL PARTNERSHIP

JULY 2021

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*The 10-year Investment Programme Framework for Hadrian’s Wall has been produced by Blue Sail Consulting working with Hadrian’s Wall Partnership.*

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# 1 INTRODUCTION

The Borderlands Growth Deal has allocated £18M to invest in Hadrian's Wall to achieve the vision that *'by 2030 Hadrian's Wall will be the most widely recognised, appealing, and authentic visitor destination in the Borderlands region, and the UK's leading example of heritage-inspired inclusive growth.'* It is anticipated the Borderlands investment will create momentum for other agencies and funding streams and lever at least a further £12M over the next ten years.

This document sets out the framework for the Investment Programme which will establish Hadrian's Wall as a visitor destination with an international reputation. A destination which will attract new visitors, who will stay longer, explore further and spend more along the Wall, particularly in its towns and villages. A destination which is an exemplar for responsible and sustainable tourism.

Much of the focus for the Investment Programme is to 'fill the gaps' to make Hadrian's Wall a coherent, integrated visitor destination which is more than the sum of its parts. The ambition is for the 1900 year old Wall to fulfil its potential as a UNESCO World Heritage Site and deliver a compelling experience for a 21<sup>st</sup> century visitor, end to end.

While visitors, the tourism offer and the economic impact are all important, the connection of communities to the Wall goes beyond that – the success of this programme will in no small part be measured by the sense of ownership and identity felt by communities along the Wall and their willingness to be ambassadors and advocates for it. At its heart, the investment programme must reflect the ambition to support equality, diversity and inclusivity – for those who live and work here, and for those who visit.

The delivery of the Investment Programme will require commitment and action by numerous partners and stakeholders. The Hadrian's Wall Partnership Board will have overall responsibility for the implementation of this Programme as a whole. Projects will be led individually or collectively by partners depending on the scope, type and location.

## 2 MARKET OPPORTUNITY

Hadrian’s Wall only attracts around 1.1M visitors each year despite Cumbria, Northumberland and Tyneside collectively welcoming over 80 million visitors. There is ample scope for growth, tapping into post-Covid interest in rural destinations, outdoor activities, and staycations, as well as capitalising on global trends of multi-generational travel, interest in learning and authentic experiences and sustainable tourism.

Local residents are of course an important market for the Wall and its attractions, but to achieve economic impact the Wall has to attract more visitors, spending more. Five market segments have been identified as having growth potential; some are current visitors to the Wall (Guided Wanderers and Exploring Families in particular) but the penetration of these markets is very low and their length of stay is short. Through this investment programme there is an opportunity to extend reach and appeal of Hadrian’s Wall to these high-value segments. The segments cut across both domestic and international markets, with Visit Britain predicting international tourism recovery by 2023/24; Guided Wanderers and Global Curios are particularly likely to feature international visitors, while the two family segments will typically be domestic. The table here describes each of the segments with their motivations and values.

The development of new products, services and experiences supported by this Investment Programme must be market-focused and meet the needs and desires of these markets, some of which occur across multiple segments.

<b>Exploring Families</b>	<ul style="list-style-type: none"> <li>▶ Motivated to travel by specific cultural activities/events</li> <li>▶ Looking for adventures to share together with an element of learning along the way</li> <li>▶ Happy to be on the road and create their own itineraries incorporating the ‘must-sees’</li> </ul>	
<b>Family Day Outers</b>	<ul style="list-style-type: none"> <li>▶ Looking for fun experiences close to home or near to holiday accommodation</li> <li>▶ Likely to stay near the beach but will plan one or two day trips that have family appeal</li> <li>▶ Fun is the name of the game; learning is an added bonus</li> </ul>	
<b>Guided Wanderers</b>	<ul style="list-style-type: none"> <li>▶ Older demographic taking multiple trips per year – longlist of places to visit</li> <li>▶ Interested in organised sightseeing</li> <li>▶ Seeking good quality experiences – more than just the highlights and importance of ‘local’</li> </ul>	
<b>Culture Trekkers</b>	<ul style="list-style-type: none"> <li>▶ Time spent outdoors exploring/walking/cycling need to be rewarded by good quality local food and drink</li> <li>▶ Rejuvenation is key – ‘escapism’</li> <li>▶ Looking for social media ‘wow’ moments</li> </ul>	
<b>Global Curios</b>	<ul style="list-style-type: none"> <li>▶ Seeking inspiring international experiences - scenic views and beautiful landscape are key motivators</li> <li>▶ Functional over luxury but trying local food and drink important</li> <li>▶ Keen to spend time exploring places of historical importance</li> </ul>	

### 3 UNDERPINNING THE INVESTMENT PROGRAMME

#### VISITOR ACCESS FRAMEWORK

Hadrian’s Wall sits across a large and complex area, spanning county boundaries, cities, towns and villages – some with an established tourism offer and others not. There is a lack of clarity for the visitor about what exactly is where, and how to plan their visit. The visitor journey can be simplified unlocking the Wall’s potential through creating a framework for accessing the Wall, increasing dwell time and spend. This framework comprises four elements with a different role and function to give structure to the visitor journey:

- ▶ **Visitor Hubs** – places of scale with good visitor infrastructure, key transport interchange, already an appealing base for tourists with wider interest and able to deliver 2+ hours dwell time
- ▶ **Visitor Gateways** – towns or villages with easy access/entry points to the Wall, reasonable visitor infrastructure and reasons to visit/spend
- ▶ **Visitor Attractions** – already a focal point for visitors, providing an in-depth Wall experience and drawing direct visitor spend
- ▶ **Visitor Stopping Points** – visual spots or points of interest which encourage exploration, provide new ways to experience the Wall and offer a light-touch experience which nevertheless encourages extended visits

The diagram here shows the Visitor Access Framework with locations which currently meet the criteria based on appropriate roles and functions that each of these places can serve to meet visitor requirements and enable the Wall to operate as a destination.

The locations identified in the framework should be the starting point for interventions, investment and pilot projects to secure and reinforce their function. However this is a dynamic framework which can change over time as investment and development takes place. Good examples of places with the potential to become gateways, with appropriate tourism-focused development, are Whitehaven and Ravenglass.

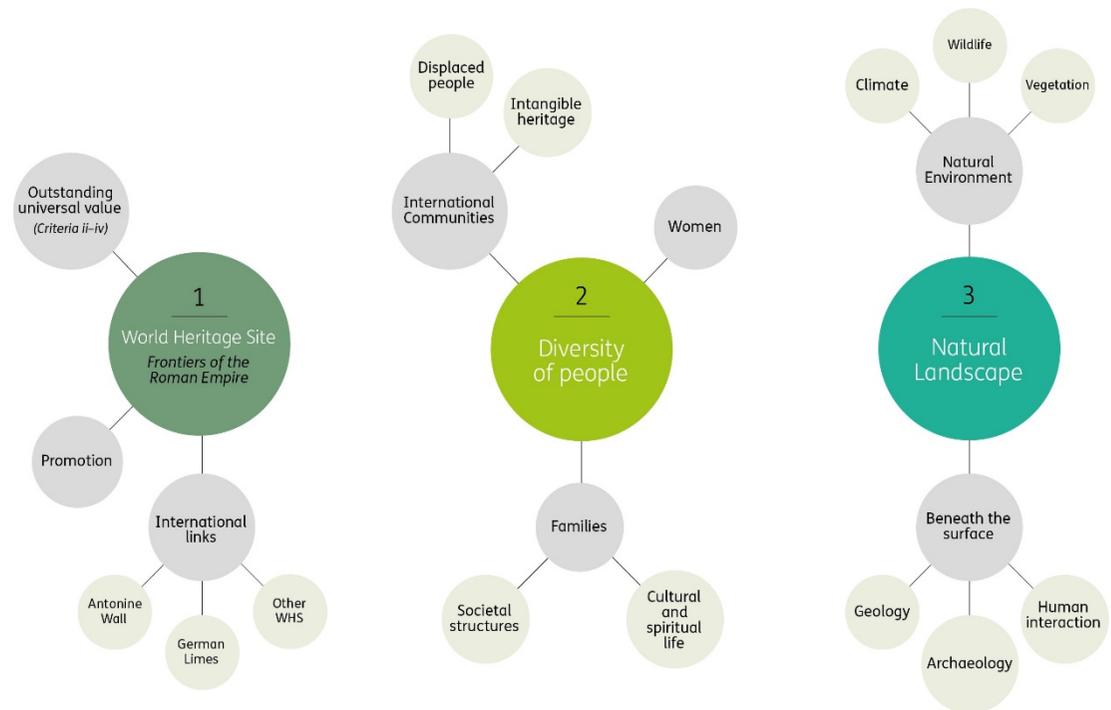


**STORY THEMES**

Hadrian’s Wall is of course fundamentally a Roman story – and that story is told well at the visitor attractions along the Wall. There are however many other untold or under-told stories associated with the Wall and its 1900 history. The diagram here shows the layers of potential stories.

Three lead themes with some sub-themes have been identified as having greatest resonance across the target markets:

- ▶
- ▶ **World Heritage Site** – increasing understanding of the outstanding universal value of being designated a UNESCO World Heritage Site, what that status means, and making links to other World Heritage Sites across the world.
- ▶ **Diversity of People** – exploring the role of the Wall in bringing international communities and displaced people together, drawing on the diversity of the Roman frontier system and increasing understanding of societal structures throughout the lifetime of the Wall to now.
- ▶ **Landscape** – looking at the unique climate, wildlife and vegetation that exists within the Wall’s landscape and understanding how its geology and archaeological finds, including those that are yet to be uncovered, contribute to our ever-increasing knowledge of the area and its history.



These story themes will run through as appropriate the projects, product and experience development that result from this investment programme.



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## 4 THE PROGRAMME

Set out in the table below are nine project areas identified as a priority for investment and intervention. Each has a short description and rationale, and is grouped by the overall need that the intervention is intended to meet. These project areas sit across the five Strategic Outline Business Case investment themes.

These project areas have been selected because:

- ▶ They support and enhance the development of the Wall as a **coherent, integrated tourism destination**
- ▶ They respond to the motivations and interests of the target markets and will **attract new visitors**
- ▶ They are likely to **extend dwell time and encourage increased spend** across length of Wall
- ▶ They support **environmentally sustainable, responsible and inclusive tourism**.

Some of the project areas set out below are single specific projects, others can more accurately be described as ‘programmes’ within which a number of projects are grouped. Some are already well-scoped projects, others could quickly be so, updating previous feasibility studies that have been done; yet others are still at concept stage.

Investment in visitor attractions (project areas 4 and 8 below) will clearly be led by the attraction owner. Project area 6 has already been initiated by each of the county councils for their area. The remaining project areas require further scoping, with most likely to need multi-agency involvement for what will be pan-Wall projects. The first stage will be to bring together ‘project work groups’ to progress the project and identify the lead agency for the purposes of scoping, developing and securing funding for the project. In many cases the lead agency is likely to be a county council.

While the Hadrian’s Wall and Wider Roman Frontier theme of the Borderlands Growth Deal will be important, there are many potential funding streams. Some projects will be eligible for Borderlands, others not. Some may be eligible for other Borderlands programmes such as the Natural Capital Innovation Zone or the Energy Programme; or other funding streams such as Heritage Lottery, Green Recovery, Tourism Recovery or Levelling-Up Funds.

Purpose	Project Area	Description	Rationale	Investment Theme	Capital/Revenue
<b>GETTING THE BASICS RIGHT</b>	<b>1. Signage</b>	Consistent, integrated, layered signage system to the Wall and its attractions - from roads, hubs, gateways, access points; driving, cycling, walking	Present the Wall as coherent destination with clear access and orientation	Visitor Information	Capital
	<b>2. Marketing</b>	Dedicated, resourced marketing team focused on promoting Wall to priority markets; including the production of marketing assets and high-quality content to inform and inspire – video, images, itineraries, digital	Raise awareness and interest in Wall more widely, and convert to visits in a highly competitive marketplace needed to achieve growth	Visitor Information	Revenue some capital (asset production)
	<b>3. Sustainable transport access</b>	New, low-carbon approaches to accessing the Wall linking the hubs, gateways and attractions; potentially to include three projects – an electric Hadrian’s Wall bus along entire Wall, e-bike infrastructure of charging, hire, storage etc and electric vehicle charging points	Improve, extend and encourage low-carbon alternatives to access the Wall easily at multiple points	Transport & Navigation	Capital and Revenue
	<b>4. Infrastructure at visitor attractions</b>	Improvement in facilities inc. toilets, parking, accessibility, e-charging points; with criteria for low environmental impact	Need to provide and maintain infrastructure to retain and manage visitors, improve accessibility and avoid environmental degradation	New & Improved Visitor Attractions	Capital

<b>FILLING THE GAPS</b>	<b>5. Stopping Points</b>	Series of three themed itineraries or points of interest – one for each of the priority stories; high-quality, innovative installations and approaches – eg viewpoints, art / sculpture, child-focused, community-based; one launched every three years	Wall wide initiative encouraging exploration, longer stays, additional reasons to visit and telling the under-told stories of the Wall	New Visitor Experiences	Capital
	<b>6. Cycling &amp; Walking Routes</b>	New, improved cycling and walking routes; specifically linking hubs, gateways, attractions; in first instance focusing on improving existing routes	New low-impact ways to access and experience the Wall sustainably, tapping into the interest in outdoor activities	Cycling & Walking	Capital
<b>DEVELOPING THE EXPERIENCE</b>	<b>7. Innovation Fund for Business</b>	Challenge fund for businesses seeking to develop or improve their product or service; criteria to include high-quality, innovation, environmental sustainability; focus on gateways and potential gateways	Support and encouragement for the business sector to provide opportunities for visitors to stay, spend, enjoy	New Visitor Experiences	Revenue and Capital
	<b>8. Attractions Investment Programme</b>	Funding support for current attractions seeking to invest in high-quality, innovative improvements to their site; build in criteria for low environmental impact	Need to continually refresh and reinvent the offer to attract new and repeat visitors; help lever funding from other sources	New & Improved Visitor Attractions	Capital
	<b>9. Signature events programme</b>	Three signature events telling stories of the Wall and/or linking to other priorities (eg cycling); multi-location, Wall-wide; high-quality programming; one launched every three years; build on 1900 festival	Raising Wall's profile, telling the stories in new creative ways and providing reasons to visit, stay and spend	New Visitor Experiences	Revenue and Capital (for infrastructure)

## 5 PHASING

This table sets out indicative activity over the 10-year time horizon of this programme. It anticipates the availability of Borderlands funding will give momentum to the early years of the programme, facilitating opportunities from other funding sources. It builds in review and refresh investment towards the end.

Project Area		2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
<b>GETTING THE BASICS RIGHT</b>	1. Signage (planning, implementation and refresh)										
	2. Marketing (asset creation and regular 'launches' of projects/initiatives)										
	3. Sustainable transport access (HW bus, other projects start in hubs/gateways then roll out, review/refresh)										
	4. Infrastructure at visitor attractions (regular investment to maintain standards)										
<b>FILLING THE GAPS</b>	5. Stopping Points (3 themes launched alternate years and refresh)										
	6. Cycling & Walking Routes (early implementation and refresh)										
<b>DEVELOPING THE EXPERIENCE</b>	7. Innovation Fund for Business (run for 5 years)										
	8. Attractions Investment Programme (regular investments to refresh and reinvigorate offer)										
	9. Signature events programme (launch one every 3 years aiming for annual programme)										

## 6 NEXT STEPS

Following agreement on this framework for the Investment Programme the next steps are to develop and specify a pipeline of projects. This will take place during autumn/winter 2021.

An initial call for expressions of interest will be issued, followed by early assessment of eligibility for Borderlands funding and a series of workshops to develop, integrate and align project proposals into a coherent programme pipeline.

The production of outline business cases for eligible projects is scheduled for winter 2021, directed by government guidance on format and content.

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