

Meeting: Culture and Leisure Sub-Committee

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Title: Hadrian's Wall 10 year Investment Plan

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Service: Environment, Housing and Leisure

Wards affected: All

1. Purpose of Report

- 1.1 The purpose of this report is to give the Culture and Leisure Sub-Committee an update on the 10 year investment programme for Hadrian's Wall.

2. Recommendations

- 2.1 The Sub-committee is recommended to note the report and comment on the presentation.

3. Background

- 3.1 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.

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 21st century visitor, end to end.

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.

4. 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 the reach and appeal of Hadrian's Wall to these high-value segments.

5. Underpinning the Investment Programme

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

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.

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 that result from this investment programme.

6. Programme

There are nine project areas identified as a priority for investment and intervention under three themes: Getting the Basics Right, Filling the Gaps and Developing the Experience.

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 the length of Wall

They support **environmentally sustainable, responsible and inclusive tourism**.

7. Phasing and Next Steps

The phasing of the programme is projected over a ten year period anticipating that 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.

Following agreement on this framework for the Investment Programme the next steps are to develop and specify a pipeline of projects.

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 early 2022, directed by government guidance on format and content.

8. Implications for Segedunum

Though not formally within the Borderlands footprint, Segedunum is an integral part of the Hadrian's Wall offer and will be part of the expression of interest process. With identified Council capital investment, eligibility to bid for the Museums Estate and Development Fund (MEND) and a National Lottery Heritage Fund to be developed, Segedunum has the potential to demonstrate significant financial leverage against the Borderlands programme.

It is hoped that this will be a positive consideration in the assessment of any project from Segedunum, in the Borderlands programme, as part of the contribution to the wider Hadrian's Wall offer.