



**Ascendant: the Elizabeth Landmark
Cold Law, Ray Estate, Northumberland**

Visitor Strategy

Ethical Planning (North East) Ltd
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1. Background

1.1 Introduction

1.1.1 This is an updated Visitor Strategy prepared in support of a planning application submitted by Ethical Partnership for a Landmark Sculpture at Cold Law, near Kirkwhelpington in Northumberland.

1.1.2 The Elizabeth Landmark (E.L) sculpture is intended to be a piece of public art in its own right and an attraction for visitors. This Strategy outlines how the attraction will be promoted and explains the nature and extent of the visitors which are expected to be drawn to the attraction. It then sets out the priorities for managing the sculpture.

1.1.3 The purpose of this Strategy is to:

- place the proposed visitor attraction in its local context;
- describe the marketing and promotion assumptions upon which the predictions for the profile of visitors is based;
- outline the considerations for the management of the Landmark during its operational phase as a visitor attraction;
- assess the impact of COVID-19 on tourism, and in doing so consider how the Elizabeth Landmark may contribute to sector recovery in Northumberland; and
- illustrate how the Landmark can contribute to wellbeing during and after COVID-19.

1.1.4 This Strategy should be read in conjunction with the Economic Impact Appraisal (February 2021).

1.2 Context and relationship to other attractions

1.2.1 Northumberland is a destination with diverse active and passive attractions for both tourists and local residents.

1.2.2 Northumberland is one of the least populated counties in England; and the site of the E.L sculpture is one of the least populated areas of Northumberland. Notwithstanding the relatively low numbers of residents, the county has a number of major tourist attractions which are destinations in their own right.

1.2.3 The roads which connect England with Scotland traverse the county generally north- south, with a number of these in close proximity to the site of the E.L sculpture. These roads are some of the most scenic in England and are used by many visitors and tourists.

1.2.4 Additionally, the C195 which forms the south-westerly boundary of the site, joins the A696 at Knowesgate. The A696 is the main arterial road that services Newcastle International Airport. The site is therefore also proximate to signposted routes from South East Northumberland, the Port of Tyne and Newcastle Upon Tyne.

1.2.5 Figure 1.1 cites the distances of various attractions from the proposed location of E.L.

Figure 1.1 Distances of Attractions from E.L.

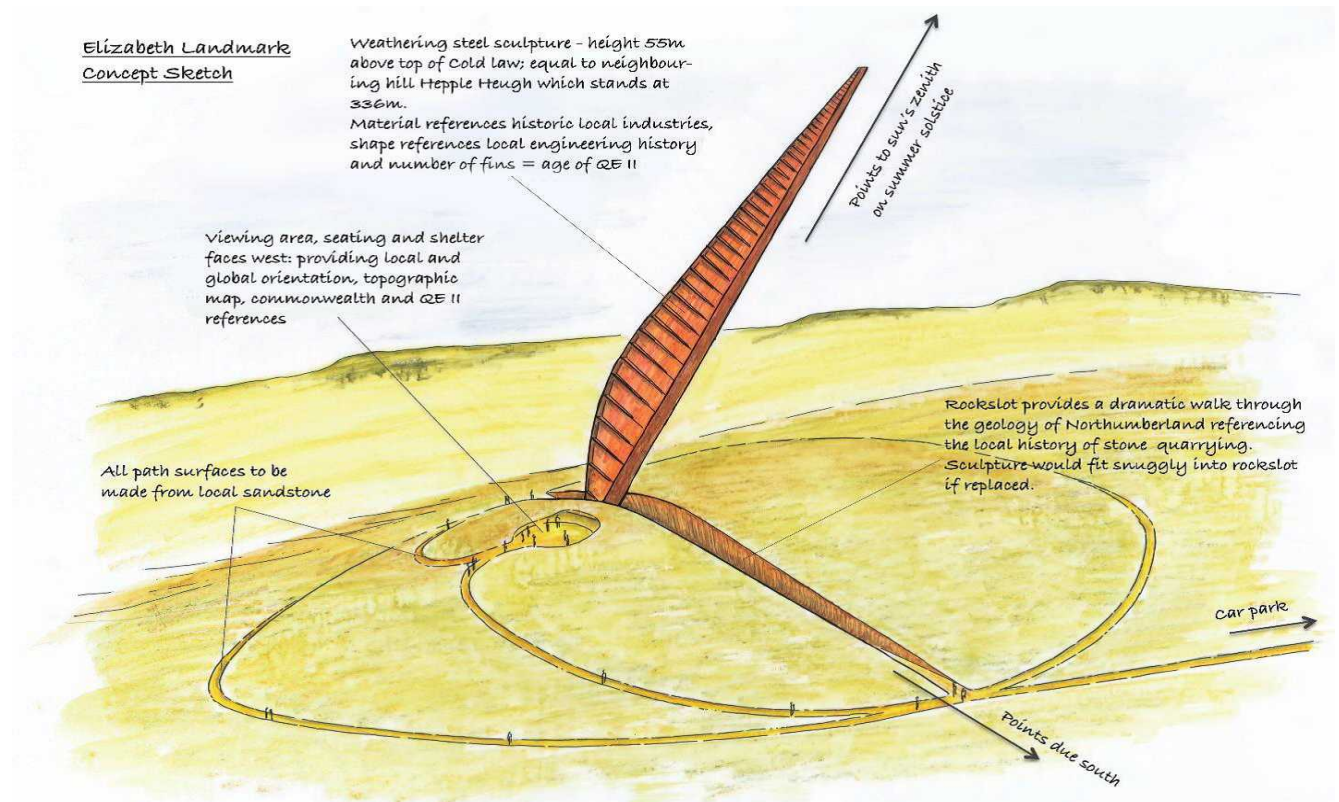
General Attractions	Distance from E.L. in km	Historic Sites	Distance from E.L. in km
Falstone Tea Rooms	21	Wallington N.T.	10
Tower Knowe - Kielder	23	Belsay Hall - E.H.	17.24
The Sill	25	Kielder Castle	30
Kielder Waterside	27	Walltown Quarry	32
Kielder Observatory	33	Penshaw Monument	50
Northumberlandia	32	Dally Castle	15.5
Angel of the North	43		
Roman Era Attractions	Distance from E.L. in km	Popular Walking Routes	Distance from E.L. in km
Chesters Roman Fort	15	Hareshaw Linn	9
Temple of Mithras	16	Hawkhope Burn	22
Housesteads Roman Fort	21	Elf Kirk Viewpoint	23.5
Steel Rigg Carpark - Sycamore Gap	25	Thirwall View	33

1.3 The Elizabeth Landmark Sculpture

1.3.1 The EL will be anchored within a ‘trough’ cut north to south through the uppermost bedrock of Cold Law. The sculpture will be tilted and elevated at the north end so that it points to the sun at its zenith on Midsummer’s day. The angled form will be around 55m high with the sculpture tip extending to a height of 336m AOD, to equal the summit of Hepple Heugh (856m to the south) and the Queen Victoria cairn (2735m to the north), each of which is at a height of 336m AOD.

1.3.2 The upper curved surface of the E.L will match the topographical form of the hill, precisely following its curved profile. The under surface will be flat. Angled lateral fins, between the upper and lower flanges, will change in pitch and frequency as they rise up the wing form, accentuating the sense of perspective and movement. Formed from Corten steel, it will have a rich orange/red finish. Details and materials for this are yet to be finalised and can be subject to a condition.

Figure 1.2 Concept Sketch by artist



1.4 Visitor Facilities: car & cycle park

- 1.4.1 The design for the car park will create a practical and robust facility suitable for all visitors, including those with mobility limitations. The car and cycle parks have been carefully crafted to integrate into and be sensitive to the character of the landscape. A framework of drystone walls will be installed to mark boundaries and create curved sheepfold features.
- 1.4.2 The location, levels and layout of the car park have been designed to minimise both visual effects and direct physical effects on the landscape, ecology and water courses. It is proposed to use lengths of retaining drystone wall and excavated site-won material to create a partial perimeter barrier to reduce visibility of parked vehicles from the wider landscape. The walls will be laid in arcs and curves to avoid introducing straight lines and geometry in this natural setting, and to be reminiscent of shelter provided by nearby Sheepfolds. They will also be used to provide an integrated and coherent setting for cycle parking, seating, bins and signs to reduce clutter and visible disruption.
- 1.4.3 Surface materials are proposed to be crushed site-won material or local stone such as whinstone, crushed down to fines to create a permeable self-binding firm surface. Edging materials, such as concrete kerbs, have been avoided to enable the surfacing to softly bleed into the adjacent landscape. This will prevent the creation of incongruous geometry or materials in this setting. Parking bays will be marked using a partial divider marker at the T points of the bays, using partially sunk timbers around 1m long.
- 1.4.4 No lighting is proposed in the carpark to avoid skyglow impacts in the context of dark skies. Full details of the design of and access to the EL are set out in the Design and Access Statement (DAS).

1.5 Visitor Access: local routes and networks

- 1.5.1 The local area has a high density of interconnected public rights of way, including footpaths, bridleways, recreational routes and cycle routes.
- 1.5.2 Nationally significant recreational routes are in close proximity to the proposed location. These afford additional access routes and extended opportunities for those walkers to appreciate the E.L sculpture. These recreational routes include: The Reivers Way located to the east of the site, running north-south, and St Oswald's Way which is just over 5km to the east.
- 1.5.3 The National Cycle Network Rote (NCN 10) is located 6km south of the site. A second National Cycle Network Route (NCN 68) identified on the 'Sustrans Cycle Map' which passes 3 km to the north west of the site. The Sandstone Way Mountain Bike Route is also within 3 km of the site and provides a link into the National Park.

1.6 Local Facilities accessible on foot and by cycle

- 1.6.1 The local pub is called The Gun Inn and is in Ridsdale, approximately 2.5km by foot from the site. Overnight accommodation at Parkhead Farm Barn is approximately 2.8km by foot/cycle. The next nearest village is West Woodburn and is approximately 4.3km by foot. Within West Woodburn are four facilities offering overnight accommodation, meals and refreshments.

1.7 Open Access Land

- 1.7.1 The site is located within an area of land designated as 'Open Access' under The Countryside and Rights of Way Act 2000 (CROW). This provides the public to have open access to the land and is intended to give greater freedom for people to explore open countryside. Within this designated land the public is free to roam and is not required to 'keep to' any paths.

1.8 Interpretation

- 1.8.1 The application is accompanied by an outline of the interpretation facilities which would be provided within the site. A detailed interpretation plan will be provided for approval by the local planning authority subsequent to a grant of planning permission.
- 1.8.2 Examples of potential interpretation, as described by the artist, within the Landmark include:
- Directional navigation points of the compass.
 - A topographical map of the surrounding land.
 - Information about the sculpture: its concept and relationship to land, history and country.
 - Text and poetry from Commonwealth nations.
 - A graphic icon of the Commonwealth flag (waterjet cut from Corten steel) will be jigsaw-set into the paving's surface.
 - Directional indication of Commonwealth capitals, their names and distances, all of which are globally positioned south of Cold Law hill itself.

1.9 Biodiversity

- 1.9.1 Currently the site has limited biodiversity due to the restricted vegetation within the site and the use of the site as a grazing pasture. As suggested within the Ecological Appraisal, the habitats within the vicinity of the Landmark will be returned to a more natural mosaic through the reduction of grazing pressure and the introduction of habitat features.
- 1.9.2 As part of this biodiversity gain the existing drainage ditches are expected to be blocked to promote the creation of mire and pools and increase the naturalness of the habitats. This taken together with the re-establishing of native woodland and scrub, and the installation of barn owl boxes, will increase the diversity of habitats within the site. A conservation management plan for the site and wider area will include prescriptions for returning the land to low nutrient substrates and to increase the areas of dry heath habitat. The implementation of the conservation management plan will diversify the flora and fauna within the site and beyond and start to restore some of the lost habitats and landscape character.

2. Marketing and Promotion

2.1 Introduction

2.1.1 The operating arrangements have yet to be confirmed for the site, however a management company will be responsible for the maintenance and management of the site. Such works are likely to be undertaken by contractors. The management company may employ part time staff 'as and when' required to support specific events and activities. The site will not have any staff located or working within the site on a day-to-day basis – it is expected to be 'unmanned'.

2.1.2 The operation of the site will not include the sale of any products or services. No income is expected to be generated within the site boundaries. In the event of an emergency signs within the site will provide details of emergency services.

2.1.3 It is expected that independent walking and tourism businesses will use the existence of the landmark as a focus for commercial walks, tours and cultural events.

2.2 Marketing Strategy

2.2.1 The key objectives of the Visitor Strategy include:

- Support and enhance the range of attractions in Northumberland;
- Support and enhance the economic viability of local and regional businesses; and
- Establish mutually beneficial partnerships with local stakeholders and businesses.

2.2.2 The ambition for the E.L is:

- To attract 25,000 visitors per annum by year 3;
- To target 40% of visitors including an overnight stay in the North East;
- To maximise the average total spend of visitors per visit (including day and overnight visitors); and
- To engage with a diverse base of stakeholders.

2.2.3 It is anticipated that without a marketing strategy 18% of visitors would stay overnight. A successful strategy, combined with other attractions in the region, would result in a greater number of visitors staying overnight with at least half in paid accommodation.

2.2.4 The promotional strategy of E.L will utilise various marketing elements to reach audiences at multiple levels. These include audiences from the local area, the North East region, the rest of the United Kingdom, and international and Commonwealth visitors. The strategy design could include digital marketing, direct marketing, advertising, event marketing, public relations, and promotions.

2.2.5 Digital marketing has already begun for E.L in the form of a website. As the project progresses from an idea to a finished product the website can be transformed into a marketing and information source on the E.L.

2.2.6 Within the website there is the opportunity for promoting links to local businesses, events and activities.

- 2.2.7 The website can also include a map of local businesses, attractions and facilities which would increase visitor awareness of the surrounding area and how they could further expand their trip through Northumberland.
- 2.2.8 Other digital marketing formats could include social media in the form of a Twitter account to keep the public updated on local events, Instagram photos which could show events, visitors and natural elements within the site, and a blog which could cover a variety of subjects on and around the site such as the geology of the local landscape to local events.
- 2.2.9 Working with existing tourism bodies and campaigns, such as Visit England, the ‘Discover our Land’ campaign to promote Northumberland and ‘Northumberland: an Independent Spirit’, E.L could be added as a feature destination. Advertisements through existing and trusted sponsors like these will give visitors the assurance that the Landmark is a destination worth adding to their visit while increasing exposure and awareness of the site.
- 2.2.10 The dedication of E.L to the Commonwealth and Queen Elizabeth II creates the opportunity for the E.L to host events throughout the year. Possible event dedications could be in relation to when the shadows of the sculpture match with specific dates such as the Queen’s birthday, the summer and winter solstices, and the spring and autumn equinoxes. An event dedicated to Commonwealth Day, the second Monday of every March, could also be held at the E.L.
- 2.2.11 Promotions which encourage visiting the Landmark and local businesses could also be developed. An example could be to take a ‘selfie’ in front of the Landmark, post it on social media with a hashtag and receive a discount at a local pub or café. The local business and the Landmark would advertise this promotion and gain exposure through the hashtags creating a collaboration in which both stakeholders would experience a positive outcome through increased awareness and visitors. As visitors share their visit to the Landmark via social media the visitors are also spreading knowledge of the site via digital word of mouth; this would then increase the probability of friends or relatives asking about their visit to the Landmark and thus expanding the level of exposure.
- 2.2.12 Direct marketing will be undertaken with various groups and businesses from the local to national level. These local stakeholders, such as local schools and Northumbria Cycling Club, will be contacted directly with information on the project and invitations to visit the Landmark. School Information Packs may be sent out to schools in the region and be made available to schools nationally and within the Commonwealth.

2.3 Detailed design and procurement phase

- 2.3.1 The design and procurement phases of the E.L will provide for the artist drawings and specifications to be shared on the existing E.L website. Many graphics have already been added to the website. These help potential visitors and local stakeholders gain a better understanding of the proposal and how they may be able to interact with it in the future.

2.4 Construction phase

- 2.4.1 The existing website www.elizabethlandmark.co.uk will continue to be a source of information. The News & Press section of the website will be updated with progress reports detailing what work has been done in addition to any special achievements or hurdles that the project has had to overcome.

2.4.2 During this period the artist and supporters will engage with local stakeholders including walking, cycling and climbing groups and clubs within the local community in respect of the opportunities for future use and enjoyment of the E.L site.

2.5 Opening and Years 1-3

2.5.1 Following completion of the E.L an Opening Ceremony could be held to promote the E.L. 'Soft market testing' will take place in advance of this opening and will be used to inform the promotions and marketing strategy. The advertisement of this event with local, regional, and national stakeholders, businesses, and tourism companies, will generate the initial interest. Existing tourism bodies, including VisitNorthumberland and VisitEngland, will be asked to feature E.L on their websites and in their brochures.

2.5.2 Community groups and schools will be invited to visit as part of community writing programmes. It is anticipated that information sheets will be available, which will have a variety of themes such as history, landscape, geology, and the Commonwealth.

2.5.3 Groups may also have the opportunity to host their own events or gatherings at Elizabeth Landmark. The social media platform developed for Elizabeth Landmark would be able to show that an event was happening and advertise the local group while the local group would be further expanding the publicity of E.L.

2.6 Years 4-7

2.6.1 A review of previous marketing and promotions will be undertaken to inform the promotion and marketing strategy for years 4-7.

2.7 Northumberland Economic Development Strategy

2.7.1 The five-year Northumberland Economic Strategy (2019-2024) sets out a vision 'to deliver a prosperous Northumberland founded on quality local jobs and connected communities. The vision of the plan is focused on creating and supporting a prosperous, inclusive and connected community'.

2.7.2 The strategy indicates that this will be achieved through the three objectives: inclusive employment, productive places and growing the business base.

2.7.3 The Economic Development Strategy identifies the following 'Priorities for Delivery':

1. Deliver industrial growth
2. Support enterprise and development
3. Develop a skilled workforce
4. Enable an inclusive economy
5. Connect the county
6. Invest in towns and communities



Figure 2.1 Vision and Objectives of the Northumberland Economic Strategy

- 2.7.4 Within the strategy there are six focus Industrial Growth Opportunities: Energy, Offshore Wind and Subsea; Health and Life Sciences; Advanced Manufacturing; Tourism and Culture; Agri-Tech; Rural Scale Up.
- 2.7.5 E.L creates potential for the local economy to benefit and 'grow'; in this way the proposal is in accordance with the ambitions of the Northumberland Economic Development Strategy. There is a clear connection between the proposal and the Industrial Growth Opportunity of Tourism and Culture as set out in the Economic Development Strategy. The project will be introducing a new attraction for tourists and residents of the north east.
- 2.7.6 It will introduce a unique association with the Commonwealth and in doing so open a new market of commonwealth tourists to visit Northumberland.
- 2.7.7 The installation of the sculpture and associated development will provide both employment and training opportunities including for local people and companies.
- 2.7.8 The addition of the E.L to the portfolio of attractions for visitors to Northumberland is expected to lead to increased expenditure in the local economy and with it the improved economic viability of existing businesses. The introduction of a major cultural and artistic attraction may stimulate new business in these sectors.

2.8 North East LEP – Strategic Economic Plan 2019 - 2024

- 2.8.1 The North East Local Enterprise Partnership ("LEP") Strategic Economic Plan is aimed at increasing the number of jobs in the North East economy by 100,000 by 2024 and ensuring that 70% of the job growth is in better jobs. The Plan also focuses on growing a more productive, inclusive and sustainable regional economy.
- 2.8.2 The delivery of the plan is split into three parts:
 - Four areas of strategic importance – Digital, Advanced Manufacturing, Health and Life Sciences, and Energy – these areas are where a stronger North East economy can be built; one that reinforces the region's position as a contributor to regional, national and global economic growth.
 - Four service sectors – Education, Financial, Professional and Business Services, Transport and Logistics and Construction – these sectors support the wider economy and offer significant opportunity for more and better jobs in the North East.
 - Five programmes of delivery – Business Growth, Innovation, Skills, employment, inclusion and progression, Transport connectivity and Investment and infrastructure – these programmes set out initiatives and projects that will deliver the ambitions of this Plan.
- 2.8.3 The management company responsible for managing the Landmark will liaise with the North East LEP to ensure that the full economic benefit of E.L is realised.

3. Expected Visitor Profile

3.1 Introduction

3.1.1 This section provides an indication of the profile of those who may be expected to visit E.L. It is a unique proposal and as such it is not possible to predict a definitive number of expected visitors. However, using available data for visitors to the region and to specific attractions in the vicinity, a reasonable estimate can be reached. This is in line with modelling expected visitor numbers and profiles for any new attraction.

3.2 COVID-19 Impact on Visitor Numbers and baseline data

3.2.1 The COVID-19 pandemic has created a major downturn in tourism in the UK and abroad. In April-June 2020, the Office for National Statistics estimates that inbound visits were down 96% on the previous year across all four journey categories: holiday, visiting friends and relatives, business and miscellaneous.

3.2.2 Tourism in Northumberland had been increasing year on year before the virus hit, which makes recovery even more important. The new agency for tourism in Northumberland has predicted that¹:

- total annual visits to Northumberland had fallen by almost 60% in 2020;
- the value of the tourism sector to local economy fell by almost £400m; and
- almost 10,000 lost tourism jobs.

3.2.3 ONS also estimates that the visitor spend in April-June 2020 was down by 97% compared with 2019.² (Whilst it is anticipated that overseas visitors to the E.L would fall primarily into the holiday category, others visiting for business, friends and family or other reasons may also include a short trip to the landmark as part of their itinerary). The OECD estimates international tourism as a whole will have dropped by 80% in 2020³.

3.2.4 It is important to note that economic activity in the majority of sectors between April-June 2020 was significantly affected by the national lockdown prescribed by central government. As such, the visitor numbers and profiles in this strategy will follow these assumptions:

1. 2020 was an 'exceptional' year which has disrupted previous trends and should not be used as a general baseline for visitor numbers
2. Data from the years 2015-2019 showed an upwards trend in growth in the tourism sector within the UK and abroad, following recovery from the previous economic downturn. This shows that the sector has potential to recover following negative shocks.
3. Whilst 2020 should not be viewed as a baseline, the effects of the COVID-19 pandemic on the tourism industry will continue in the short-medium term, notably with a shift towards 'staycations' whilst confidence in travel abroad remains lower. This will likely mean that domestic (UK resident) spending on UK tourism will

¹Visit Northumberland Recovery Survey 2020 - Northumberland Tourism

² <https://www.visitbritain.org/latest-monthly-data-1> (correct as of 13/01/2021)

³ <http://www.oecd.org/coronavirus/policy-responses/rebuilding-tourism-for-the-future-covid-19-policy-responses-and-recovery-bced9859/>

increase in the short term; but overseas spending on UK tourism will decrease in the short term.

- 3.2.5 Whilst overseas visitor numbers are likely to remain low in the next few years, evidence from areas of lesser restrictions during summer 2020 indicate that visits to local cultural and outdoors destinations by UK residents remain popular. The National Trust recorded five million visitors to their properties by early September⁴. The World Travel and Tourism Council ("WTTC") predict that domestic tourism will be the first section of the sector to recover and recommend incentivising this. Further, WTTC indicates that trips involving outdoor excursions are likely to comprise a large part of the sector in the short term⁵.
- 3.2.6 McKinsey's tourism recovery model⁶, predicts a cumulative drop of \$3tr to \$8tr before tourism expenditure returns to pre-Covid-19 levels. The recovery model set out an optimistic recovery scenario, combining rapid virus containment and rebounding economies, would see recovery to 85% of 2019 volumes by 2021 and a full recovery by 2023. Under a pessimistic recovery scenario, 2021 levels can be as low as 60 percent of 2019, further postponing the recovery.
- 3.2.7 The above research suggests that as the Covid-19 pandemic continues and restrictions remain in place, the recovery to pre 2020 level could take up to 2023 for full recovery. This research also found that countries which are less reliant on international travel, and air travel, will rebound quicker as their domestic travel (or 'staycation' market) will provide the catalyst for a tourism recovery.
- 3.2.8 The most recent Covid-19 Consumer Tracker⁷ (January 2021) confirms this position with a continuing worsening position in consumers plans to travel, some of the headline findings including:
- the proportion of UK adults feeling 'the worst is still to come' has almost doubled since the last wave (conducted in early December), with majority (62%) presently of this opinion; some 19 percentage points higher than the 'all wave average';
 - only 7% now believe 'the worst has passed' - over three times lower than in Wave 21;
 - 33% of UK adults intend to take the same or more UK short breaks compared to normal between now and the end of March, representing a significant decline on the 40% recorded in Wave 21. The 46% who plan on taking fewer short breaks, is also a significant rise on Wave 21; and
 - the pattern is similar for longer breaks, with the proportion planning on taking 'more or the same' compared to normal falling from 38% to 32%.

⁴ <https://www.nationaltrust.org.uk/press-release/more-historic-national-trust-sites-reopen-as-charity-welcomes-five-million-visits-to-its-houses-and-gardens>

⁵ https://www.oliverwyman.com/content/dam/oliver-wyman/v2/publications/2020/To_Recovery_and_Beyond-The_Future_of_Travel_and_Tourism_in_the_Wake_of_COVID-19.pdf

⁶ <https://www.mckinsey.com/industries/travel-logistics-and-transport-infrastructure/our-insights/covid-19-tourism-spend-recovery-in-numbers#>

⁷ https://www.visitbritain.org/sites/default/files/vb-corporate/covid-19_consumer_weekly_tracker_wave_22_final.pdf

- 3.2.9 The above findings demonstrate that a recovery is hard to predict, and that consumer sentiment is worsening as the Covid-19 pandemic continues and worsens, even in light of a vaccination programme. What is apparent is that the likelihood of a significant recovery in 2021 is now unlikely to happen, and there is a strong possibility that short and more local 'staycation' will lead the recovery.
- 3.2.10 'Staycations' are now even more likely to lead the tourism recovery over the first part of the new decade, which will also be driven by the UK's departure from the EU. As witnessed when the value of the pound weakened in 2015/16, the UK tourism economy (and Northumberland) witnessed an upsurge in demand and tourism performance. This is expected to be a considerable feature to the UK's tourism recovery in a post Covid-19 world.
- 3.2.11 It is this position which supports investment in new local assets, attractions and activities. Essentially, encouraging more people to stay and spend in the UK, whilst awaiting international travel to recover. Investment in assets, attractions and activities will play an increasingly valuable role in enticing people back out and into normality.
- 3.2.12 The Elizabeth Landmark with a launch date around 2022/23, has the potential to play a significant role in supporting the expected staycation boom, and benefiting from an upsurge in UK domestic demand, once the Covid-19 pandemic is under control.
- 3.2.13 The E.L has potential to contribute to this recovery and to draw visitors in conjunction with another attraction and/or stops for refreshments.

3.3 General assumptions and area context

- 3.3.1 The visitor market assessment draws on figures from published sources prior to the Covid19 pandemic. As noted in the preceding section the tourism market was severely affected by the pandemic, with a huge drop in visitor values and volumes. A tourism recovery is expected to commence once the vaccination programme is completed. Therefore this Visitor Strategy draws on visitor trends and research from before the pandemic. There is a paucity of empirical data on the profile of visitors to other sculptures located in open countryside. News stories and reports however, quote data which can provide some indications of the potential range of profiles.
- 3.3.2 It is expected that E.L will attract between 15,000 and 25,000 visitors within the first three years of its opening. It is important to note that there is no financial or other requirement for E.L to achieve any specific target number of visitors.
- 3.3.3 It should also be noted that with an estimated earliest completion date of 2022, the short-term visitor numbers would not take effect immediately, but rather at a time where a certain degree of recovery in the tourism sector is expected to have taken place.

Medium term: International tourist visits encompassing Elizabeth Landmark

- 3.3.4 The proposed sculpture and surrounding landscaping contain significant references to the Commonwealth. As such, the previous working assumption was that any significant interest from Commonwealth and overseas tourists adding the landmark to a UK itinerary could result in visitor numbers reaching 30,000 - 40,000 between years 4-7.

- 3.3.5 It is feasible that international tourist numbers may remain low for several years, depending on issues such as governments' vaccination requirements for international travellers. The UN World Tourism Organisation expects that recovery to pre-crisis levels will not be reached until at least 2023. However, if an operational start date of late 2022 is assumed for the landmark, this would give the attraction several years to attract domestic and possibly short-haul international visitors before significant numbers of Commonwealth and longer-haul international visitors would be expected in years 4-7, between 2025-2028.
- 3.3.6 This being the case, the high estimates for visitor numbers have been retained here as the short term domestic visits provide an effective 'buffer' or lag time during which international tourism can recover.
- 3.3.7 These high numbers have been applied to the predicted visitor profile and are included within Figures 3.2 to 3.11.
- 3.3.8 Northumberland County Council has also invested significant efforts into ensuring that the county's tourism economy will bounce back to its £1bn performance of 2019⁸.
- 3.3.9 Northumberland has already taken a leading role in developing a coordinated approach to supporting the tourism recovery, in July 2020 Northumberland County Council and Northumberland Tourism joined forces under the auspices of Visit Northumberland. This new arrangement brings together the current tourism function at the council with Northumberland Tourism.
- 3.3.10 Visit Northumberland carried out their own Recovery Survey in 2020⁹, which also confirmed that many local tourism businesses felt it would take up to and more than a year for a recovery to commence. However it also reported that 'the confidence in the ability to take a domestic short break/holiday continues to gradually improve'.

3.4 Walking visitors

- 3.4.1 The area surrounding the site is well served by Public Rights of Way, Footpaths and Bridleways. These paths will enable walkers to easily add the E.L as a final or en-route destination.
- 3.4.2 It is assumed that most visitors by foot would be walking a considerable distance across the landscape. However, due to the area being well populated by Public Right of Way Footpaths and Bridleways, some visitors may be walking from nearby villages where accommodation is available.
- 3.4.3 Some of the visitors are expected to be from the many North East walking clubs and the Ramblers' Association. The objectives of the Ramblers' Association are to promote walking, protect rights of way, campaign for access to open country and defend the beauty of the countryside. A free book of planned walks is provided by the Association in addition to the formation of various walking groups within Northumberland and the country. Some of the local groups likely to use the E.L as a destination include the Northumbria Walking Group, Northumbria Family Walking Group, Hexham Ramblers, Tyneside Ramblers.

⁸ <https://www.chroniclelive.co.uk/news/north-east-news/effort-launched-revive-1bn-northumberland-18690952>

⁹ Visit Northumberland Recovery Survey 2020 - Northumberland Tourism

- 3.4.4 Other walking visitors are assumed to be likely to visit as part of a package walking holiday. North East and other walking package companies such as Shepherds Walks Holidays, Inn Travel Walking Holidays and Celtic Trails Walking Holidays currently host and sometimes guide walkers through the Northumberland countryside. Currently all host guided and self-guided walks along popular trails such as Hadrian's Wall and the Northumberland Coast. Walkers do have the option to alter their walk to add features similar to E.L. Package walking holidays of up to a week duration walks are currently priced between £500- £1000.

3.5 Cycling Visitors

- 3.5.1 There are routes suggested by cyclists on a variety of websites which pass within 1.5km – 2km of the site. There are also Public Right of Way Bridleways which allow cyclists the option of additional routes.
- 3.5.2 The many cycle-friendly routes in the surrounding area have easy connections to the proposed location of E.L. The advent of battery assisted cycling will mean that the site is more accessible than previously by cycle. As the cost of e-cycles falls this is likely to be an increasingly popular form of travel to the EL. The smaller roads through Bellingham, Redesmouth and Birtly also connect the A68 and the site to routes within the Northumberland National Park and Kielder Forest.
- 3.5.3 It is expected that cycling clubs such as Northumbria Cycling Club and Tyneside Vagabonds would add E.L as a destination to their event calendar. One of the main meeting places for the Tyneside Vagabonds is a café located in Elsdon, an 8-mile cycle journey from Elizabeth Landmark. Most of cycle journeys for local clubs vary from 30 – 100 miles, making Elizabeth Landmark an easy day trip from the wider area such as Newcastle (30 miles), North Tyneside (36 miles), or Corbridge (18 miles) where there is a cycle café which serves food and sells cycling kits and spares.
- 3.5.4 There are also commercial holiday travellers where visitors have paid for a guided or self-guided cycle route and accommodation along popular routes in Northumberland. These routes can be modified by the traveller if they wish, which will enable E.L to be easily added to their journey. Skedaddle is a popular company which has multiple Holidays in the Northumberland region such as Hadrian's Cycle Way, Alnmouth, and Northumberland Coast. These tours are currently priced between £300 - £500 and include stay at a hotel or bed and breakfast with breakfast meals included.

3.6 Visitors by Car

- 3.6.1 Car based travel is expected to be the main mode of transport used by visitors. This is due to the rural character of the local and wider area and limited public transport.

3.7 Visitors by Motorcycle

- 3.7.1 The number of visitors traveling by motorcycle may be influenced by the tradition of traveling A68 as a scenic route. This would increase the number of motorcyclists expected to visit compared to other features. The A68 is known as a scenic route which motorcycle clubs frequently travel as a group. The road is also listed as a 'motorcycling road' on some biker club websites. These groups agree on various places to meet along traveling routes,

such as the A68, and at art features such as the Angel of the North. Club-meetups usually include an extended visit to local restaurants, pubs or cafes.

Figure 3.1 North East Coalition of Motorcycle Clubs



3.8 Coaches

- 3.8.1 As E.L is proposed along a popular route to the Borders and Kielder Forest Park, holiday coaches would have the opportunity to add a scenic stop along their route. Currently there are multiple coach holidays which visit the surrounding area. Some of these include Just Go Holidays which visits Northumberland, Hadrian's Wall, Holy Island and Alnwick Castle. This holiday has the option to add other excursions for £10 per person.
- 3.8.2 Travel 55 offers Northumbrian Tours from £350 to £500. All trips include accommodation in local hotels and host 30 to 56 visitors.

3.9 Public Transport

- 3.9.1 Currently there is no public transport that goes directly past the site. There are two bus routes which stop at The Gun Inn pub, approximately a 35 min (1.7 mile) walk from the site. These routes include the 882 (Hexham to Colwell, stopping two times a day), and 885 (Byreness to Hexham, only runs on Tuesdays and stops once).

3.10 Conclusion

- 3.10.1 It is anticipated that cars will be the main mode of transport for most visitors, with perhaps 88% of visitors arriving by this mode during the first few years.
- 3.10.2 It is anticipated that perhaps 5% of visitors will arrive on foot by walking through the surrounding countryside to the site or from local villages/accommodation.
- 3.10.3 Visitors traveling by Coach, Motorcycle or cycle are expected to represent approximately 6% of the visitors in the first few years. It is expected that this will increase over time.
- 3.10.4 The visitors arriving by public transport are unlikely to be a large number unless services change significantly.

Figure 3.2 Visitor mode of transport

Mode of Transport	Car	Coach Trip	Public Transport	Motorcycle	Cyclists	Foot
	88%	2%	1%	2%	2%	5%
Years 1-3 No. visitors /p.a.	13200 to 22000	300 to 500	150 to 250	300 to 500	300 to 500	750 to 1250
Years 4-7 No. visitors /p.a.	26400 to 35200	600 to 800	300 to 400	600 to 800	600 to 800	1500 to 2000

3.11 Status of visitor

3.11.1 Based on other data it is anticipated that approximately 54% of visitors will be arrive as a 'two-some'. It is expected that 15.5% will arrive as families. Based on data those who arrive as a group of friends will make up 14.8% of the visitors each year. It is anticipated that 10% of those visiting will be unrelated or unassociated with each other forming part of a group or club. Solitary visitors are likely to make up approximately 6% of the visitors.

Figure 3.3 Status of Visitor

Type of Visitor	Single	Couple	Family	Friends	Group/Club
	6%	54%	15.50%	14.80%	10%
Years 1-3	900 to 1500	8100 to 13500	2325 to 3875	2220 to 3700	1500 to 2500
Years 4-7	1800 to 2400	16200 to 21600	4650 to 6200	4440 to 5920	3000 to 4000

3.11.2 It is anticipated that the 25% of the visitors will be aged 56-65, while 20% will be 66+. It is expected that approximately 20% will be 46-55 and 15% of visitors are expected to be aged 36-45. Within the younger cohorts, 13% are likely to be between 25-25 and 7% between 18-24. Although children are expected to accompany families the numbers are not expected to be significant and so have not been counted separately (refer to Figure 3.4).

Figure 3.4 Visitor Age Groups

Age	66+	56-65	46-55	36-45	25-35	18-24
	20%	25%	20%	15%	13%	7%
Years 1-3	3000 to 5000	3750 to 6250	3000 to 5000	2250 to 3750	1950 to 3250	1050 to 1750
Years 4-7	6000 to 8000	7500 to 10000	6000 to 8000	4500 to 6000	3900 to 5200	2100 to 2800

3.12 Place of Residence

3.12.1 It is anticipated that the majority of visitors will be from outside of North East- currently thought to be 83% of visitors. It is anticipated that 9% of visitors will be from the North East and 5% will be resident in Northumberland. Approximately 2.7% of the visitors are expected to be from outside of the UK (refer to the Figure 3.5).

3.12.2

Figure 3.5 Visitor Place of Residence

Place of Residence	Northumberland	North East	UK	International
	5%	9%	83.30%	2.70%
Years 1-3	750 to 1250	1350 to 2250	12495 to 20825	405 to 675
Years 4-7	1500 to 2000	2700 to 3600	24990 to 33320	810 to 1080

3.13 Accommodation

3.13.1 It is anticipated that approximately 18% of visitors will be staying overnight within Northumberland, while 82% will be taking a day trip to the area (refer to Figure 3.6).

Figure 3.6 Visitor Accommodation

Visitor Numbers	Staying Visitors		Day Visitors
	Paid Accommodation	Staying with Friends/Relatives	
	12%	6%	82%
Years 1-3	1800 to 3000	900 to 1500	12300 to 20500
Years 4-7	3600 to 4800	1800 to 2400	24600 to 32800

3.14 Duration of visit

3.14.1 The average length of stay for visitors who stay in serviced accommodation is approximately 2.3 nights. Those staying in non-serviced accommodation stay for an average of 7 nights, while those staying with friends or relatives stay an average 2.4 nights (refer to Figure 3.7).

Figure 3.7 Length of Overnight Stay

Average Length of Overnight Visit to area	Serviced Accommodation	Non-serviced accommodation	Visiting Friends & Relatives
	2.3 nights	7 nights	2.4 nights

3.14.2 It is anticipated that approximately 53%, of those visiting E.L will be on a holiday away from their home. Whilst it is anticipated that approximately 38% of visitors will be on a 'short' day trip of less than three hours travel from their or a relative's home. Those visitors who are on a day trip of over three hours from their home or a relative's are likely to make up approximately 9% of the visitors (refer to Figure 3.8).

Figure 3.8 Duration of Visit

Duration of Visit	Day Trip < 3 hours	Day Trip 3+ Hours	Holiday Away
	38%	9%	53%
Years 1-3	5700 to 9500	1350 to 2250	7950 to 13250
Years 4-7	11400 to 15200	2700 to 3600	15900 to 21200

3.15 Local Economic Benefits

- 3.15.1 Figure 3.9 below indicates a potential allocation of the expenditure by visitors to E.L. These benefits will accrue through visitor expenditure on local services and products. Some additional benefit could be seen in the occasional employment of contactors associated with the maintenance of the site. Further details can be found in the Economic Impact Assessment dated February 2021 as prepared by Frontline consultants.
- 3.15.2 There will be short term benefits to the local economy associated with the construction of the E.L.
- 3.15.3 The long-term economic benefits will principally be delivered through expenditure in the food & drink sector.

Figure 3.9 Potential Distribution of Economic Impact

Sectoral Distribution of Economic Impact	Undefined	Transport	Shopping	Recreation	Food & Drink	Accommodation
	25.80%	10.20%	6.60%	8.60%	36%	12.90%

3.16 Seasonal & peak visitor times

- 3.16.1 The profile for when visits will take place is based on the profiles of visits to Northumberland and North-east open-air tourist attractions.
- 3.16.2 The number of visitors at an outdoor attraction will be influenced by the weather, however where accommodation is associated with the visit it is less weather dependent as the accommodation is usually booked well in advance.
- 3.16.3 Generally, the profile is weighted in favour of summer visits. However, with increasing numbers of short breaks the profile for outdoor attractions is less dominated by the summer period. The extent to which students and pupils will be brought or encouraged to the site associated with studies is not known. Figure 3.10 shows the anticipated seasonal profile for visits to the E.L.

Figure 3.10 Visitor Numbers by Season

Seasons	Spring	Summer	Autumn	Winter
Visitor Numbers	23.10%	36.90%	20.70%	19.30%
Years 1-3	3456 to 5775	5535 to 9225	3105 to 5175	2895 to 4825
Years 4-7	6930 to 9240	11070 to 14760	6210 to 8280	5790 to 7720

- 3.16.4 The desk-based assessment of the profile for visitors to E.L anticipates it mirroring that of other similar outdoor, passive attractions with no facilities. These sites and E.L experience their peak number of visitors in the month of August while the fewest number of visitors are in November. Throughout the year it is during the weekends when most visitors are expected. Figure 3.11 summarises the anticipated number of visitors during the peak

month (August) and the low month (November) on weekends and weekdays. These are based on the expected number of visitors in Years 1-3 and Years 4-7.

Figure 3.11 Peak and low Visitor Numbers

Visitor Numbers	Peak	Lowest
	August	November
	13.30%	4.50%
Years 1-3	Weekend	
	106 to 166	30 to 57
	Weekday	
	35 to 55	10 to 19
Years 4-7	Weekend	
	200 to 267	68 to 90
	Weekday	
	67 to 89	23 to 30
Totals Per Year		
Years 1-3	1950 to 3250	870 to 1450
Years 4-7	3900 to 5200	1740 to 2320

3.17 Accessibility

3.17.1 The access provided by the proposed paths leading to and around E.L is a facility. This designed to accommodate people with mobility limitations. These facilities at the E.L could become a destination /attraction for those with mobility limitations.

3.18 Potential for additional benefits to the local economy

3.18.1 An independent economic impact assessment completed in January 2021 found that under a mid-point scenario of 27,500 visitors per annum, the following impacts would arise at the Northumberland level:

- visitor expenditure: £2.99m per annum;
- tourism jobs: 64 FTEs; and
- GVA: £1.86m per annum.

3.18.2 There are a number of less tangible - but still considerable - economic benefits which will accrue over a longer timeframe if the project is successfully delivered. Many of these have been evidenced in the review of other sculptures, as presented in Section 2 of this report. In fact, it is these longer term more strategic benefits where there are likely to be 'legacy' benefits and go beyond the immediate economic impacts presented above.

3.18.3 These longer-term strategic benefits include:

- supporting sustainability of other local tourism businesses - food and drink, retail, travel, gifts, accommodation, recreational activities and their suppliers, including other visitor attractions, assets and activities;

- construction and maintenance related impacts associated with developing and operating the new iconic landmark;
- perception related benefits which will encourage more people to visit, stay and potentially invest in the local area;
- supporting the new recovery action plans of local stakeholders, across business, economic development and tourism themes - whilst maintaining a strong link to the environmental and sustainable development agenda;
- delivering an iconic and high profile landmark will showcase the area, and at no cost to the public purse;
- potentially leveraging in public funding for other projects in the area as more visitors are attracted to the area;
- essentially free promotion and publicity, and in joined up and collaborative manner in line with the new Visit Northumberland digital marketing platform and tourism recovery plan;
- environmental and health related benefits associated with supporting Visit Northumberland's 'Discover our County' through a new iconic landmark which supports the destination ambition and destination credentials of Northumberland;
- opportunities to showcase other assets in the area through trails, waymarking and interpretive boards in and around the E.L;
- artists may also be inspired by the E.L and choose to use it as an inspiration for their artwork;
- scope for further volunteering and social enterprise activities associated with aspects of the development, through interpretation, historical and environmental themes, where local groups can become more involved in the development, maintenance and promotion of the proposed development; and
- souvenirs or memorabilia of the E.L may be franchised and offered by local companies.

4. Tourism Attractions & Facilities

4.1 Introduction

4.1.1 The review of the availability and nature of tourist attractions and associated facilities was based on two study areas. The first study area is within 5km of the site and the second within 30 km.

4.1.2 The local study area represents and includes those businesses, attractions and facilities who may have the greatest opportunity to benefit from the E.L. Those in this wider study area have a similar opportunity to economically benefit from the E.L, but this benefit is less tangible and will require stronger associative marketing for such benefits to be realised.

4.2 Immediate study area - within 5 km

Figure 4.1 illustrates that there are seven providers of overnight accommodation within 5km of E.L; two of these are licenced public houses whilst Brandy Bank House is also a 'tearoom'. In total there is capacity for 53 guests in approximately 27 rooms, as well as 5 caravan or motorhome pitches.

Figure 4.1 Accommodation within 5km of E.L

Accommodation within 5km of Elizabeth Landmark				
Type	Accommodation	Distance from E.L	Village	Number of Beds
Pub & Rooms	Gun Inn	1.9km west	Ridsdale	Sleeps 7 - 3 rooms
Pub & Rooms	The Bay Horse Inn	3.9km north-west	West Woodburn	Sleeps 10 - 6 rooms
Self-Catering Cottage	Wanney Holiday Cottage	1.7km west	Ridsdale	Sleeps up to 4 people
Cottage	Parkhead Farm Barn	2.55km west	West Woodburn	1 cottage - sleeps 4 in 2 bedrooms
Hotel	Brandy Bank House - Guest house	3.65km north-west	West Woodburn	Sleeps 16 in 8 rooms
Cottages (2)	Sweethope Crofts	3.8km south-west	Near Harle	Each cottage sleeps 4 in 2 rooms
Caravan site	Lough House CL	3.8km south-west	Near Harle	Up to 5 pitches
B&B	Yellow House	3.9km	West Woodburn	Sleeps 8 in 3 rooms

4.3 Sweethope Adventures and Holidays

4.3.1 Sweethope forms part of the Ray Estate. It covers an area which hosts two lakes: the Great Lough (140 acres) and Little Lough (12 acres). These are the headwater of the Wansbeck River which cuts its scenic way to the North Sea through some of Northumberland's prettiest scenery.

4.3.2 Sweethope offers a range of outdoor activities:

Fishing:

- Trout fly fishing – for individuals or groups
- Pike fishing – for individuals or groups

- Fishing coaching for those seeking to improve their skills

Outdoor adventure activities:

- Archery
- Abseiling
- Rock climbing
- Ballista Construction
- Raft Building
- Mountain biking
- Kayaking
- Canoeing
- Weaseling
- Problem Solving
- Survival training
- Search & Rescue challenges

4.3.3 Sweethope has two holiday cottages located on the shore of the Great Lough. This offers accommodation for up to 4 people per cottage; and cottages can be rented separately or together (see Figure 4.1).

4.3.4 Additionally, there is a Caravan Club Certified Location site on the north bank of the Little Lough. This accommodates up to 5 touring caravans and motor homes for up to 28 days per stay. The site is open all year.

4.3.5 In parallel to the above facilities and activities, Sweethope offers catering packages which include refreshments, brunch, lunch, afternoon cake and tea, and main evening meals. These are available for between 8-100 persons.

4.4 Otterburn

4.4.1 Otterburn is a small village approximately 8.5km north of E.L. Some attractions within the village include the RTC Sports Centre and Girsonfield Racing. Within the village there are 4 restaurants, a small local shop, and a local mill shop and café. There are also 8 accommodation providers for visitors, some of which rent out spaces for events such as weddings.

4.4.2 As a village within a 12-minute drive to E.L, it is expected that those staying in accommodation at Otterburn will have the opportunity to easily visit the Landmark. Visitors will also be able to stop at the local shop and restaurants on their way to or from the Landmark.

4.4.3 As such it is anticipated that some of the economic benefit of E.L could accrue to existing and new businesses located in Otterburn.

4.5 Bellingham

4.5.1 Bellingham is a small town on the bank of the Tyne, located approximately 8.5km West of the E.L. It is sometimes described as the “gateway town to Kielder Water & Forest Park”¹⁰. The town has a range of accommodation on offer including The Cheviot Hotel, Lyndale Guest House, Riverdale Hall Hotel, and The Bankhouse Apartment & Mews. There is also a Caravan Park at the north end of the village and a YHA Youth Hostel located on Pennine Way. The town also has a number of cafes and pubs, such as the Carriages Tea Room, a

¹⁰ <https://www.visitnorthumberland.com/bellingham>

converted train. Additionally, there is a Heritage Centre offering exhibitions and educational opportunities. Bellingham golf course lies at the northern end of the town.

4.5.2 Bellingham is approximately 15 minutes' drive away from the E.L or a 2 hour 20 minute walk. There is also a petrol station, Bellingham Garage Services, on Pennine Way.

4.5.3 As such, it is expected that some visitors to E.L may combine their visit with a trip to facilities in Bellingham and may stay in accommodation in the town. It is likely therefore that some of the economic benefits of the landmark may accrue to businesses in Bellingham.

4.6 Knowesgate & Kirkwhelpington

4.6.1 Knowesgate is a small village on the crossroads of A696 and the C195, on which E.L is to be located. It is approximately 5 miles from the site and a 7-minute drive or a 25-minute cycle. Within Knowesgate there is accommodation at the Greensbury Hotel, which is also called the Knowesgate Hotel, and serves breakfast and drinks until 8pm. There is also a petrol station. There is a post office in Kirkwhelpington.

4.6.2 Visitors to the area may stay at the Knowesgate Hotel and stop at the petrol station to refuel. Snacks may also be purchased at the petrol station.

4.6.3 As such it is anticipated that some of the economic benefit of E.L could accrue to existing and new businesses located in Knowesgate and Kirkwhelpington.

4.7 Morpeth

4.7.1 Morpeth is a large historic market town and the location of Northumberland County Council. It is located approximately 17 miles or 27.5km east of the site. There is a large variety of accommodation, restaurants, and shops. There are multiple petrol stations, health services, and parks within and around the town. Morpeth is approximately 20 miles and a 40-minute drive or a 2-hour cycle to the proposed location for E.L.

4.7.2 Visitors leaving Morpeth and traveling west would easily be able to add E.L to their journey to areas such as Kielder or to travel along the A68. Those traveling east from areas such as Kielder Forest Park would be able to stop at the Landmark on their way to stay in Morpeth.

4.7.3 It is unlikely that any significant direct economic benefit will accrue to businesses based on Morpeth as a direct result of the Landmark. However, it may help to add an additional attraction to the existing offer within the area around Morpeth.

4.8 Hexham & Corbridge

4.8.1 Hexham is a historic market town located approximately 13 miles or 21km south of the proposed site. It contains a wide variety of accommodation, restaurants, and cafes. Within the town there are also shopping centres, a train station, health services, and parks. The town is approximately a 30-minute drive or a 2-hour cycle from the proposed site.

4.8.2 Corbridge is the neighbouring village to Hexham. Adjacent to the village is the Corbridge Roman Town – Hadrian's Wall run by English Heritage, which is a well-known attraction to the area. Within the village is a variety of restaurants, cafes, and accommodation. There is also a petrol station, shops, and a health centre. The village is approximately 20 miles south of the proposed site and is approximately 2-hour cycle or 25 minutes by car.

4.8.3 Due to the short drive from both areas, visitors could easily add a trip to E.L to their day or overnight trip to the area.

4.9 Hadrian's Wall

4.9.1 Hadrian's Wall is a Roman wall which stretches for 73 miles from coast to coast. The condition and material of the wall varies based on location. Hadrian's Wall Path or Hadrian's Cycle Path, both supported by tour guides or done solo, inspire travellers to travel from one side of the country to the other to experience the landscape along Hadrian's Wall. There are a variety of official and unofficial carparks at roadsides in addition to the sponsored locations such as The Sill, Housteads Roman Fort, Corbridge Roman Town, and Chester's Roman Fort and Museum.

4.9.2 The closest location is Chester's Roman Fort and Museum, which is run by English Heritage. It is located approximately 14.7km or 9 miles from the proposed location for E.L and is a 1 hour and 30-minute cycle or 20-minute drive. The fort has toilets, a tearoom, parking area, a souvenir shop, and adventure playground.

4.9.3 A second English Heritage attraction is Corbridge Roman Town, which is located approximately 16 miles south of the proposed location for E.L. It would be a 25-minute drive or a 2-hour cycle from the Roman Town to E.L. Within the attraction are facilities such as toilets, café, picnic area, shop, parking and play areas.

4.9.4 Due to the short drive from both areas, visitors could easily add a trip to Elizabeth Landmark to their day or overnight trip to the area.

4.10 Kielder Forest

4.10.1 Kielder Forest Park contains a variety of attractions including historic buildings, water-based activities on the reservoir, hiking, cycling, events at the Observatory and other outdoor based activities. Facilities within the park include multiple restaurants, accommodation, visitor centre, and toilets.

4.10.2 The Tower Knowe Visitor Centre, located in the eastern area of the park, is approximately 23km west of E.L and is a 30-minute drive or 2-hour cycle. Visitors to Kielder traveling east would be able to easily add E.L to their day or overnight trip due to the short drive to the site and its location on routes to and from major settlements such as Morpeth and Newcastle upon Tyne. As E.L is to be located between the two A-roads which allow travellers to reach Kielder, it would also easily enable them to add E.L to their visit.

5. Conclusions

5.1 Introduction

5.1.1 This strategy has outlined the ways in which the E.L will operate as a passive visitor facility, its management and marketing, and its relationship to other attractions and facilities in Northumberland.

5.2 Visitor attraction

5.2.1 The E.L project aims to provide a unique visitor attraction that will complement the existing visitor offer in Northumberland.

5.2.2 The exact details of site maintenance and management will be formulated during the detailed design stage, but this will likely include a charitable trust to maintain the site. Ultimate responsibility will lie with the applicant and the landowner in perpetuity.

5.2.3 A marketing strategy will be created to maximise awareness of the landmark and help realise potential benefits for local businesses. This will include online and print marketing and liaison with local businesses.

5.2.4 The E.L will provide an additional tourist draw that supports the aims of the Northumberland Economic Strategy 2019-2024 and the 'Discover Our Land' initiative.

5.2.5 An independent economic impact assessment completed in February 2021 found that under a mid-point scenario of 27,500 visitors per annum, the following impacts would arise at the Northumberland level:

- visitor expenditure: £2.99m per annum;
- tourism jobs: 64 FTEs; and
- GVA: £1.86m per annum.