

Ref: 9401/AGW
Issue date: December 2001

BRACKENHILL TOWER THE GRAHAM STRONGHOLD

A REVIEW OF THE DEVELOPMENT PLAN OF JUNE 1997



PREPARED ON BEHALF OF
BRACKENHILL TRUST

BY

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INTRODUCTION

Introduction

In June 1997, the Brackenhill Tower Trust received a Development Plan, prepared by Ray Hopper Associates and Richard Jaques. On 6 November 2001, a proposal to review this Development Plan, by Giles Quarme & Associates and Global Tourism Solutions (UK) Ltd., was accepted by the Trust.

The purpose of this review was not to replace the earlier plan but to update it in the light of changing circumstances, and uncertainties for the future occasioned by the impacts of the Foot & Mouth Disease in Cumbria and the events of 11 September in the USA.

Because of the tight time lines the specific issues, identified by the two companies in collaboration, were as follows:

- Production of a report by Dr. Walls, Giles Quarme & Associates, evaluating the restoration and development proposals of 1997, advising on potential alternatives, if necessary, and also to include the updating of the overall 1997 project cost to 2001 figures. The report elements would cover:
 - ❖ Landscaping
 - ❖ The 16th Century Tower
 - ❖ The 1860 Shooting Lodge
 - ❖ The 1717 Farmhouse
- Production of a report by David James, Global Tourism Solutions (UK) Ltd., reviewing and, where possible, updating the following elements:
 - ❖ Present general tourism context
 - ❖ Current local and regional research
 - ❖ Estimated visitor numbers
 - ❖ Estimated visitor income (£'s 2001)
 - ❖ Updated (revised) five-year projections
 - ❖ Projected economic impacts
 - ❖ Multiplier effects

In addition, an “Issues Identification” event was conducted by David James in the offices of Carlisle City Council on 21 November 2001. The purpose was to test the opinions of the Brackenhill Tower Trustees and others closely associated with the project. The outcomes are set out at *Appendix A*.

The review outlines a more prudent approach in the confidence that it is realistic and achievable, providing a firm basis for flexible and incremental programme development by the Trustees in the future. The primary objective is to ensure the stabilizing of the buildings and site integrity in a sustainable manner, supported by a workable revenue budget and operating plan.

SECTION 1
EXECUTIVE SUMMARY

Executive Summary

Situation

Brackenhill Tower, located some 10 miles to the north east of Carlisle, was built in the 16th Century by the Graham clan. Its Border location in the “Debatable Lands” ensured it was central to the ebb and flow of Anglo-Scottish relationships and a ready litmus test of the affairs of state between the two nations.

The Tower, and later additions of an 18th Century cottage and a Victorian hunting lodge, have deteriorated to a fragile and increasingly unsafe condition. The buildings remain essentially complete, especially the Tower and the lodge, and a Brackenhill Tower Trust has been formed under the Chairmanship of Bruce Graham, the present clan chief.

Mission

To reinstate the above buildings, a related barn in the immediate grounds, and to develop uses which are appropriate to the individual building styles. For example, the Tower would be reinstated as of 1584 and interpreted as though the family had just left; the Victorian hunting lodge to a library and meeting place, and the cottages for a variety of uses, e.g. catering, administration, display areas, education and meeting rooms, etc.

Execution

The Brackenhill Tower Trust has been formed with the support of elected Members and Officers of Carlisle City Council, as well as appropriate professionally qualified people drawn from the community and afar. The Trust has the objective of reinstating the buildings and surrounding areas and operating them for the benefit of the visitor, the immediate community and area in which it is located.

Administration

The estimated capital cost of site acquisition, reinstatement, professional fees and VAT is £3.7 million, of which £2.775 million is sought from the Heritage Lottery Fund.

A revenue base budget has been established with appropriate five-year projections. This budget is spartan but provides a firm base for a planned and sustainable development with flexibility to be adapted to market opportunities.

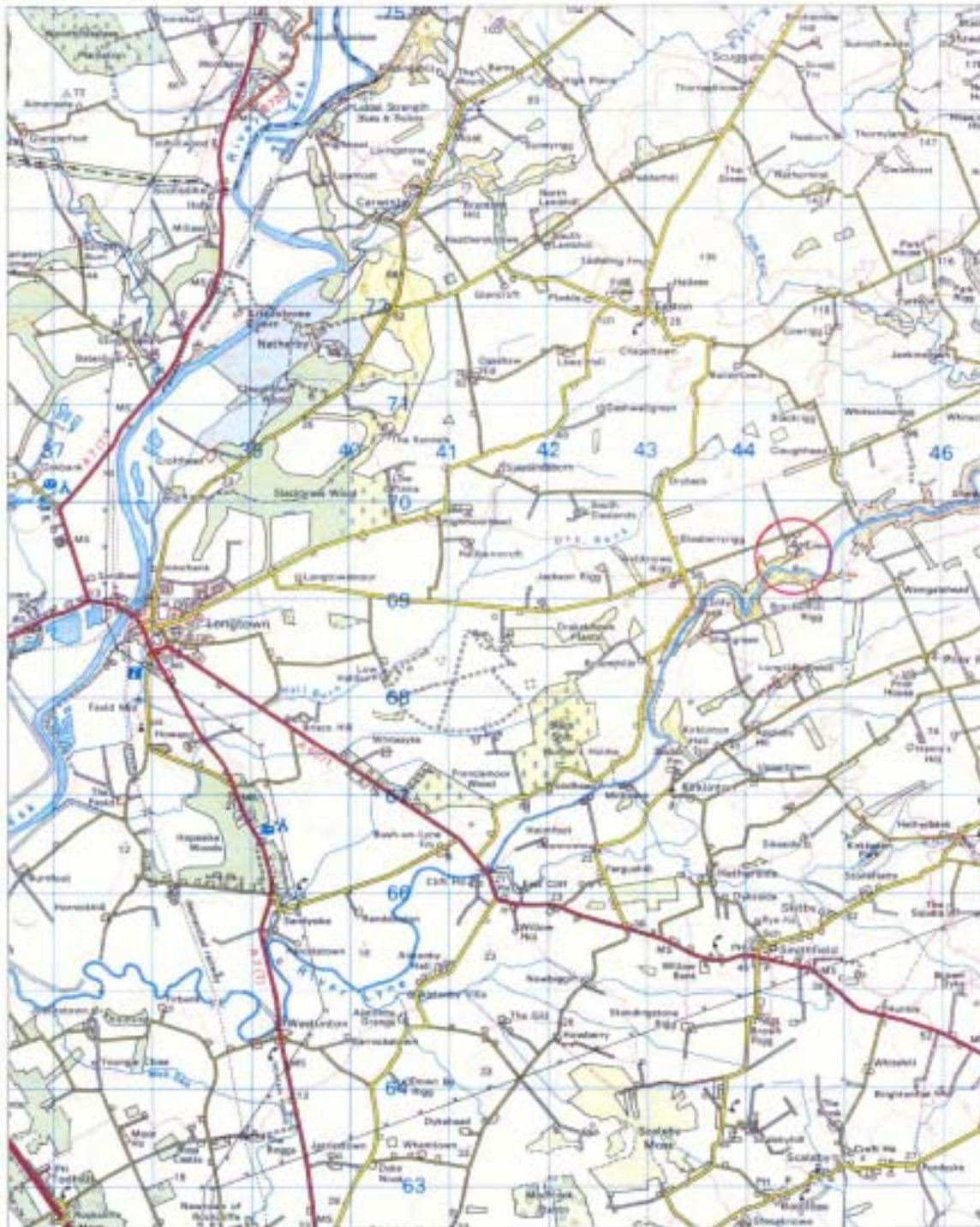
Context

This document is intended to be read in conjunction with the Ray Hopper Associates Brackenhill Development Plan, 1997. Recommended adjustments and modifications are identified throughout this report and benefit from the most recent information available.

SECTION 2 SETTING THE SCENE

Location map showing Brackenhill Tower

**The Landscape and the Tower Complex: their
potential for development**



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Brackenhill Tower - location

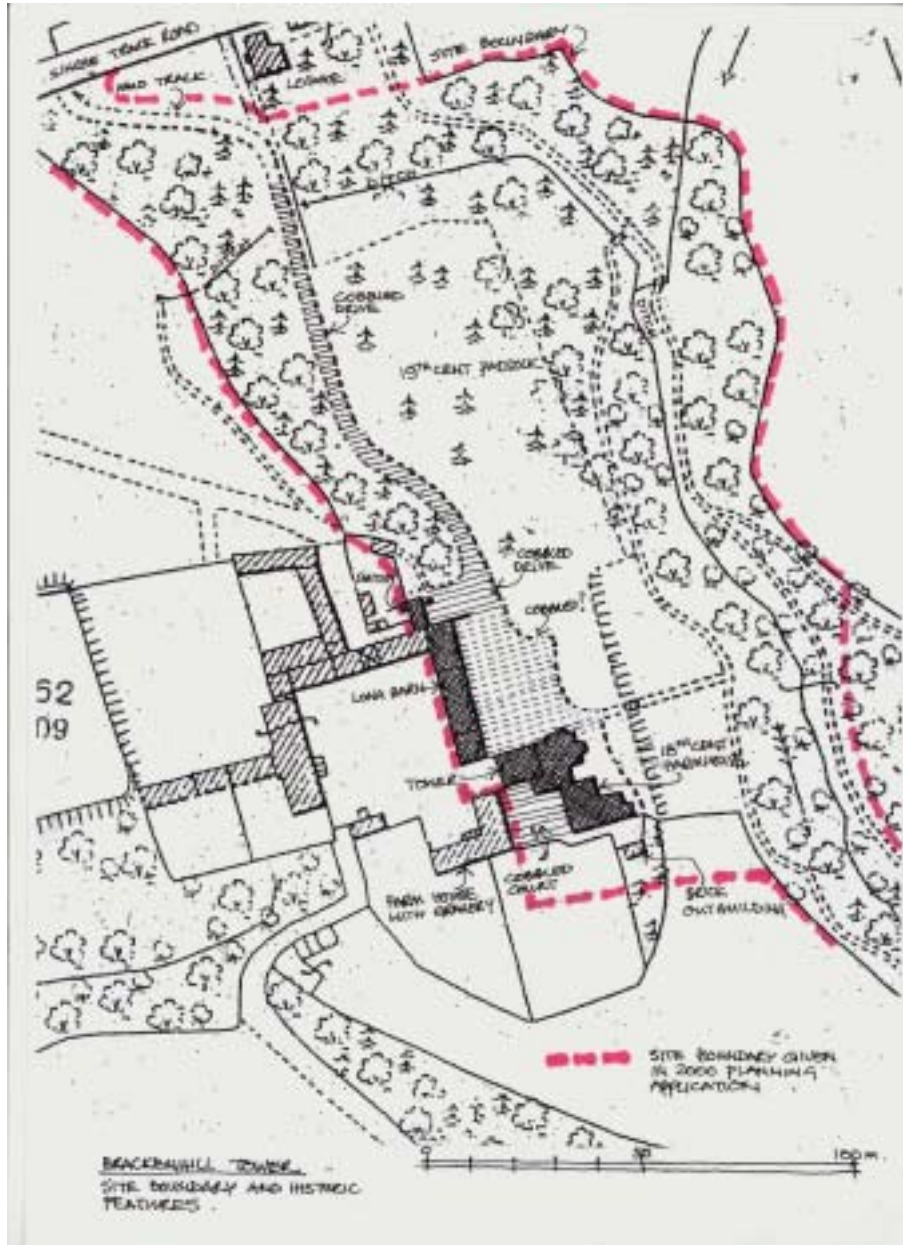
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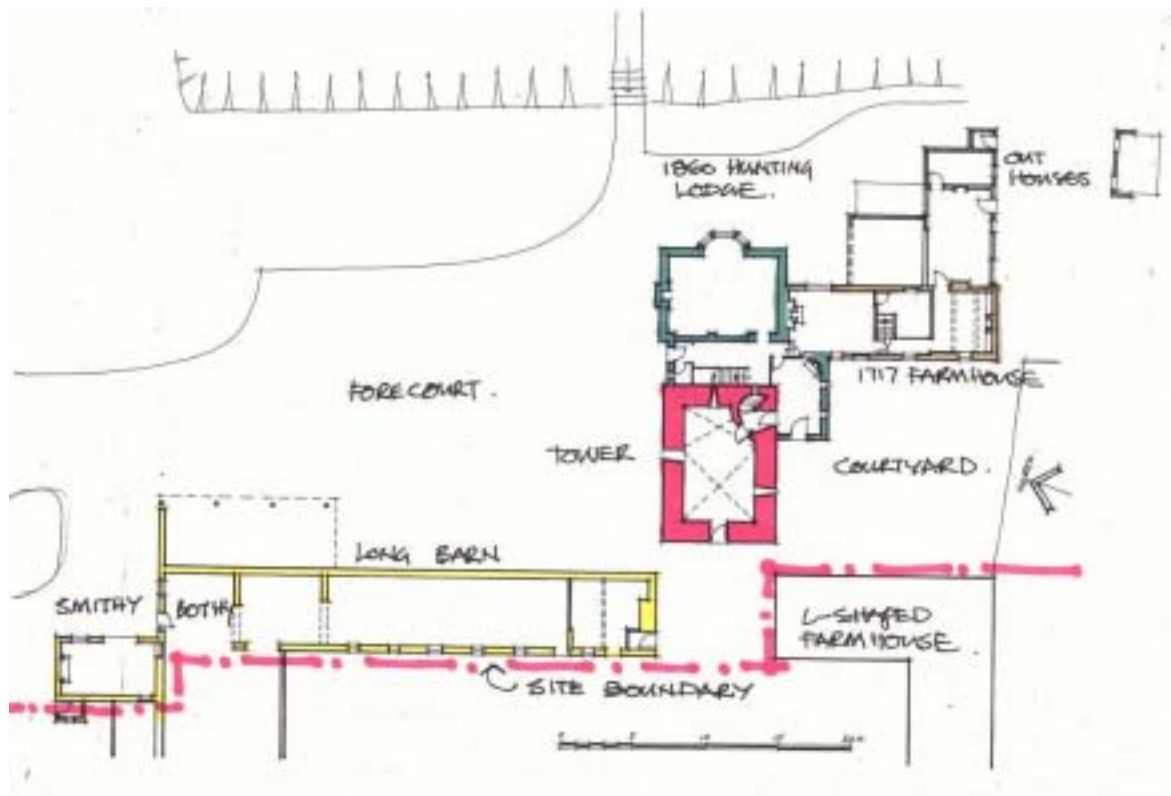
The Landscape and the Tower Complex: their potential for development.

Located some 10 miles north east of the City of Carlisle, the Brackenhill Tower is associated with the Border family of the Grahams and with reiving; today the complex adjoins Brackenhill Farm. There is an agreement to sell to the Brackenhill Trust the tower and the wooded slopes to the east of it as defined by the site boundary (this is based on the Planning Application drawings dated 2000).



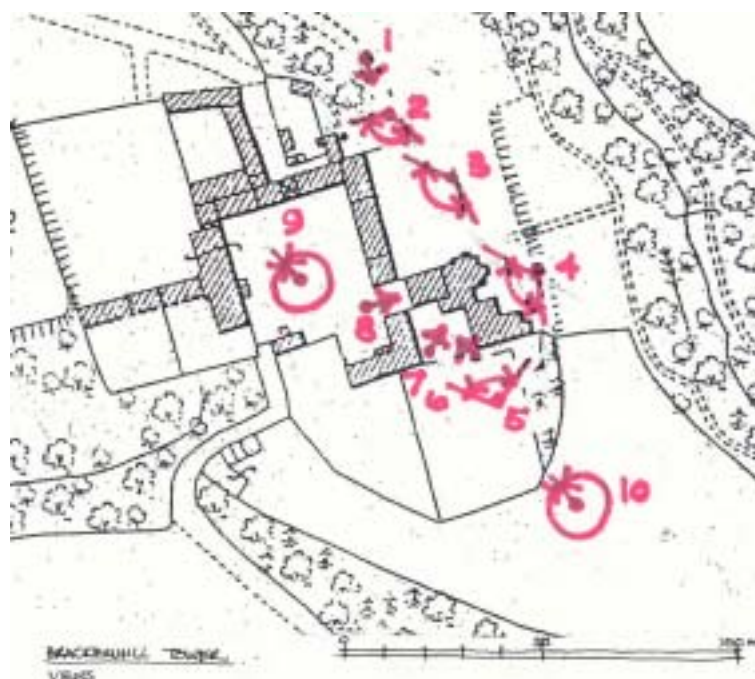
In the 19th century the Tower had a baronial Hunting Lodge added to it along with other “improvements” to the landscape including a cobbled drive beginning at a small gatehouse or lodge at the estate’s formal entrance beside the single-track public road. This gatehouse has recently been sold off with the result that a part of the drive was removed to make way for its extended garden. This fact has a knock on effect on any proposals, whether now or in the future, as it reduces the planning options for the location of visitors car parking as will be demonstrated later.

The Brackenhill Tower complex consists of the old Smithy and the ‘Bothy’ at its northern end, the Long

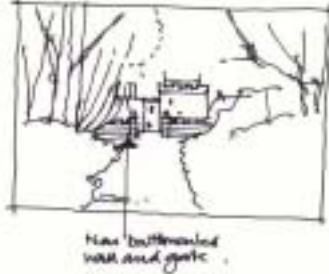


Barn along its western boundary before arriving at a narrow gap between it and the Tower and with the Hunting Lodge to its east and the 1717 Farm house to its south. The L-shaped farm house does not form part of the Trust's property.

The Tower is strategically located with a commanding view of the surrounding countryside and which will certainly be appreciated by visitors to Brackenhill. By way of a series of ten sketches we wish to identify and show some of the site's landscape and points of interest by following a route from the cobbled drive, around the Tower, then through the adjacent farm to terminate with a 360° panorama of the site.



It is from the cobbled drive that a visitor has the first view of the



Tower. It was proposed in the 1997 Development Plan to extend the existing battlemented wall across the drive where it meets the cobbled forecourt of the Tower and form a new gate between stone piers. We agree with this idea, as it would help create a sense of enclosure to the forecourt. It would also help to obscure any cars parked at the north end of the paddock from anyone standing beside the Tower.



The entrance forecourt to the complex is presently defined by the Hunting Lodge, the Tower, and the Long Barn and by a short section of battlemented wall. Outside the wall is the Smithy and beside it a door leading into another barn, part of which is within the site boundary and which we refer to as the Bothy. As part of the site management the proposed gates could be closed out of visiting hours to allow for private use of the grounds by self-catering visitors or by private functions. We propose that the Smithy and Bothy are used for ticket sales and office accommodation. In the 1997 proposals these spaces were allocated for self-catering units.



The entrance forecourt when seen from the east emphasises to the fact that the Tower is the focal point for any visitor rather than any of the other buildings. Our proposal is that the Tower is used for exhibiting the Graham Family documents and more general material relating to the Border Reivers as it is the fulcrum of the Brackenhill complex and will be the main reason for people coming here. The Long Barn can only be used for single storey accommodation for the roof trusses are only four metres above the floor and thereby cannot accept the two storey

exhibition and cafeteria as proposed by the 1997 plan. With some ingenuity it may be possible to arrange for two storied units positioned between the roof trusses but they could not be linked together to form one continuous high level space.

In 1860 the Tower was joined to

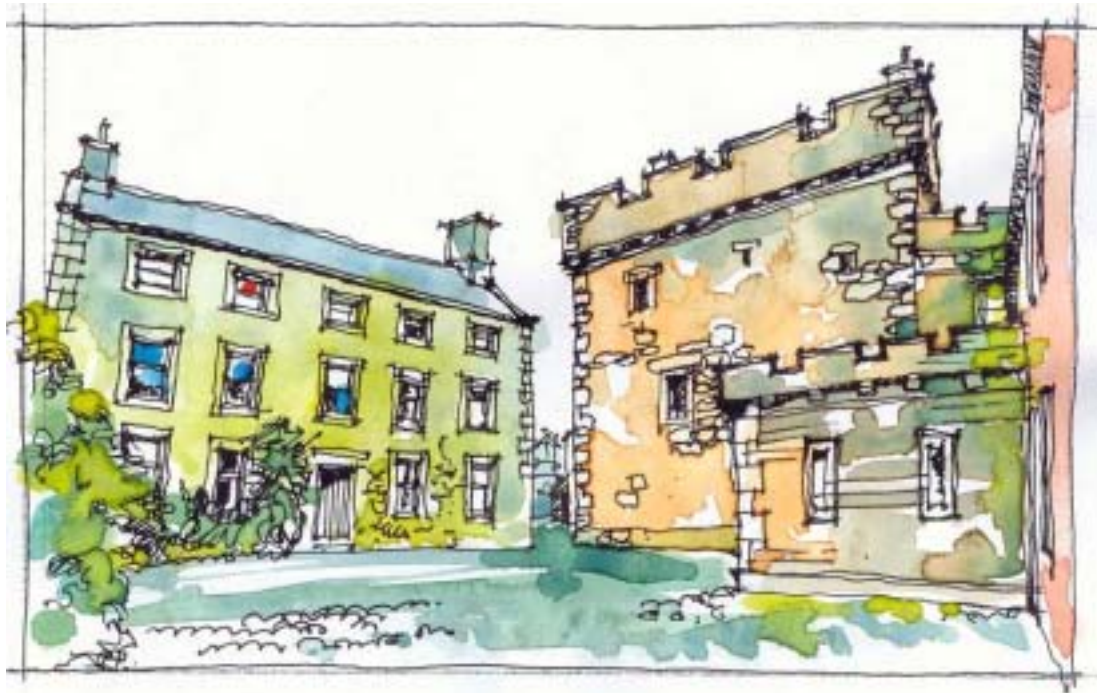


the 1717 Farm House when the Hunting Lodge was constructed, and shortly after that, the battlemented brick outhouses were built. Unfortunately, the present state of the outhouses can only be termed ruinous, their roofs have collapsed and self-seeded trees are growing in them. We propose that the 4.5 x 5 metre central outhouse is retained and conserved so that it can be used again, perhaps as quiet working spaces or as classroom. This is in contrast to the 1997 proposals to demolish and then building completely new structures to compensate. If our strategy is followed it would return the space and buildings to their late 19th century form whilst providing useable space in an acceptable manner.



Seen from the south east the gable end of the 1717 Farm House is linked to a single storied late 19th century wing built in brick and with a slated roof, this we propose to restore and use as kitchen space. The battlemented building with the lean-to roof, we suggest, could be enlarged to provide additional workshops for traditional crafts without impinging greatly on the qualities of the site. This is in contrast to the 1997 proposals that show an extension at right angles to the battlemented wing to provide self-catering accommodation, and we have assumed although the drawings do not actually show it the demolition of the battlemented outhouse.

On the left of the Tower is the L-shaped farmhouse; it is not included in the agreed site boundaries of Brackenhill Tower. The proximity of the farmhouse to the Tower is an extremely important element in the management of the Tower as a place of public entertainment, every effort should be made to co-ordinate the uses of both buildings, otherwise there is a potential for disagreements between the different owners and consequential damage to both of their interests.



This cobbled courtyard, framed on three sides by buildings, is open to the south and in summer is a 'suntrap' and could profitably be used by visitors as an external café, being so closely connected to the proposed kitchen in the 1717 Farmhouse. It is this type of use that could easily lead to the potential conflict referred to previously and which must be addressed as soon as possible.



The cobbled courtyard in addition to its café use will function as the external hub of the complex with its direct access to the reception hall in the Hunting Lodge, the turnpike stair of the Tower and to the 1717 Farmhouse.



Directly to the west of the Tower is a small cobbled space with narrow gaps leading to the entrance forecourt and the cobbled courtyard, this completes the circuit around the Tower complex as contained by the agreed boundary. This space has advantages dependant on any agreements arrived at by the Trust and the farmer. If the farmer agrees to limited access through his property this could be the point to which vehicles could come if they were bringing things to the Tower, like sandwiches, display boards, tables and chairs. Also, if the running of the public events at the farm and the Tower could be co-ordinated then this is the point where the two properties meet and also this space is actually very much a part of the larger one, which we have for convenience called the Square.



The Square is presently the stalling, or working centre, of the farm and through it access is gained to the surrounding fields. With the L-shaped farmhouse at its south east corner and old barns on west, north and east sides, it is a space that could be used for demonstrations by re-enactments by 'Border Reivers' or other military societies demonstrating historic manoeuvres, or it could be filled by fun fairs and side shows, all of which are likely to attract visitors and thereby provide an income to the mutual benefit of the Trust and the farmer.



The Tower is strategically positioned just above the 200-foot contour line which is the highest contour on both sides of the River Lyne and so the views from the parapet of the Tower are uninterrupted for miles. From the middle of the field to the south east of the Tower, a 360° panorama of the landscape well illustrates this and it is not as impressive as the views from the ramparts where visitors will be able to go.



**SECTION 3
THE PROJECT**

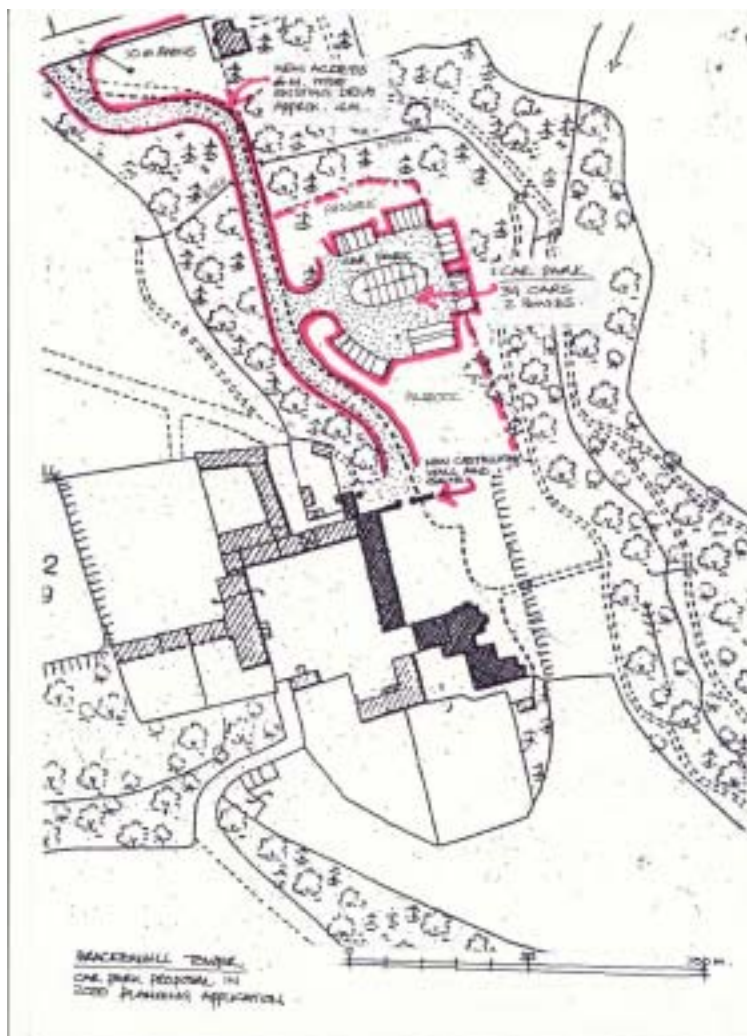
The 1997 Access and Landscaping Works: An Assessment

The 1997 Proposed Building works: A Commentary

A comparison of the 1997 and 2001 Proposals

The 1997 Access and Landscaping Works : An Assessment

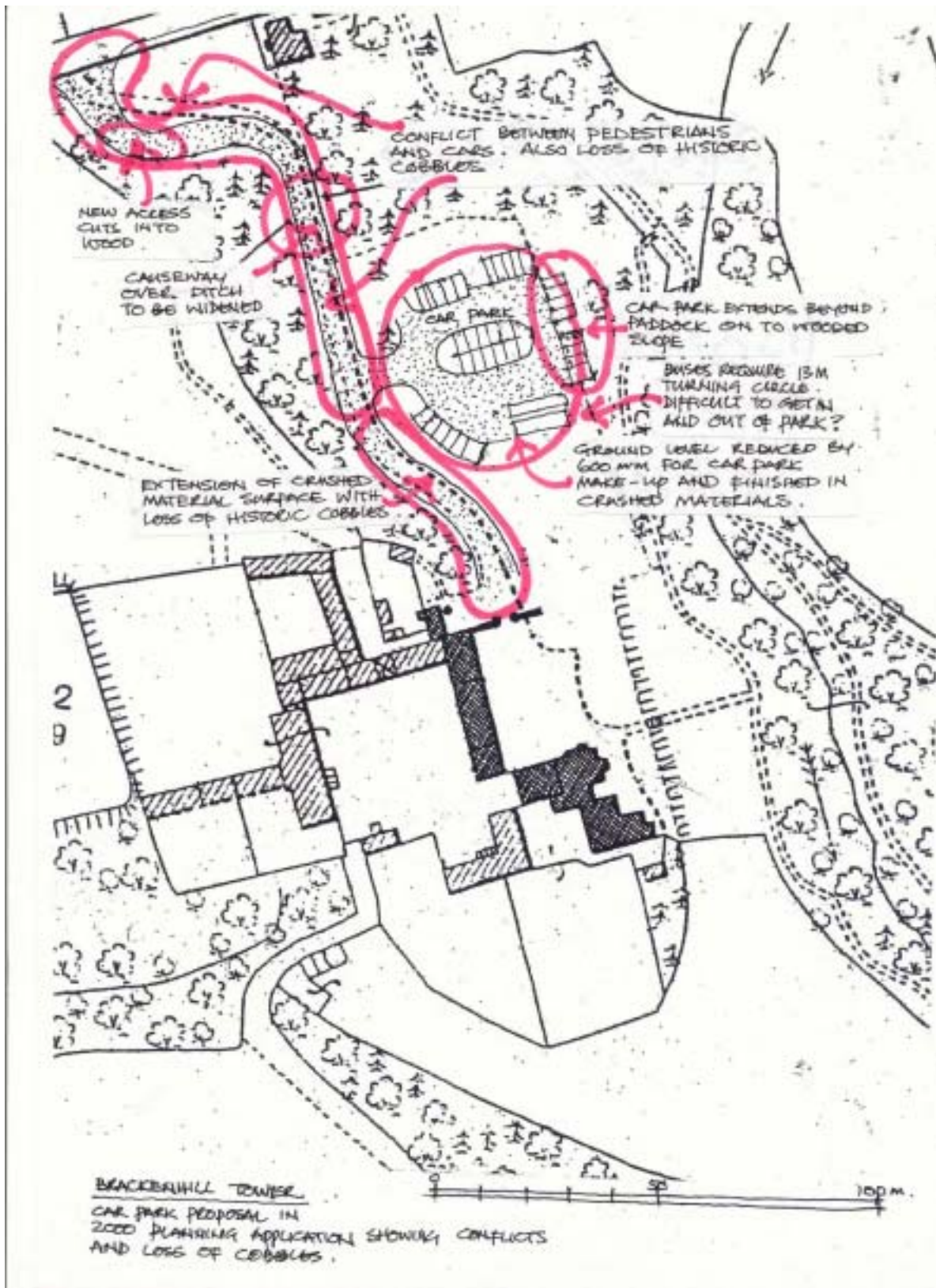
In the 1997 Development Plan the 'Schedule of Access and Landscaping Works' considered the formation of the passing places on the highway, the access road within the site, car parking provision, the clearing away of outbuildings and concrete bases in the woodlands at the north east of the site and the extension of a battlemented boundary wall.



The proposed parking provision was for twelve cars and two coaches. But in 2001 Planning Permission was granted for 34 cars and 2 buses a considerable increase on the original requirement and as designed it would have a permanent and detriment effect of the Paddock area, an area shown on the early maps of the estate. The problems created by these access proposals are, first, the conflict between the walking visitors and cars either arriving or leaving the site, secondly, the potential for permanent damage to the historic woods, thirdly, the loss of form of the 19th century causeway across the ditch extending around the north of the Paddock and fourthly, the destruction of the existing cobbled drive.

Starting at the entry to the site our detailed comments of the existing plans (to be read with drawings 'Car Park Proposal in 2000 Planning Application' and 'Car Park Proposal in 2000 Planning Application showing conflicts and loss of cobbles) are as follows:

1. The 6 metre wide access road forms a bell mouth that cuts into the existing woods and that it removes



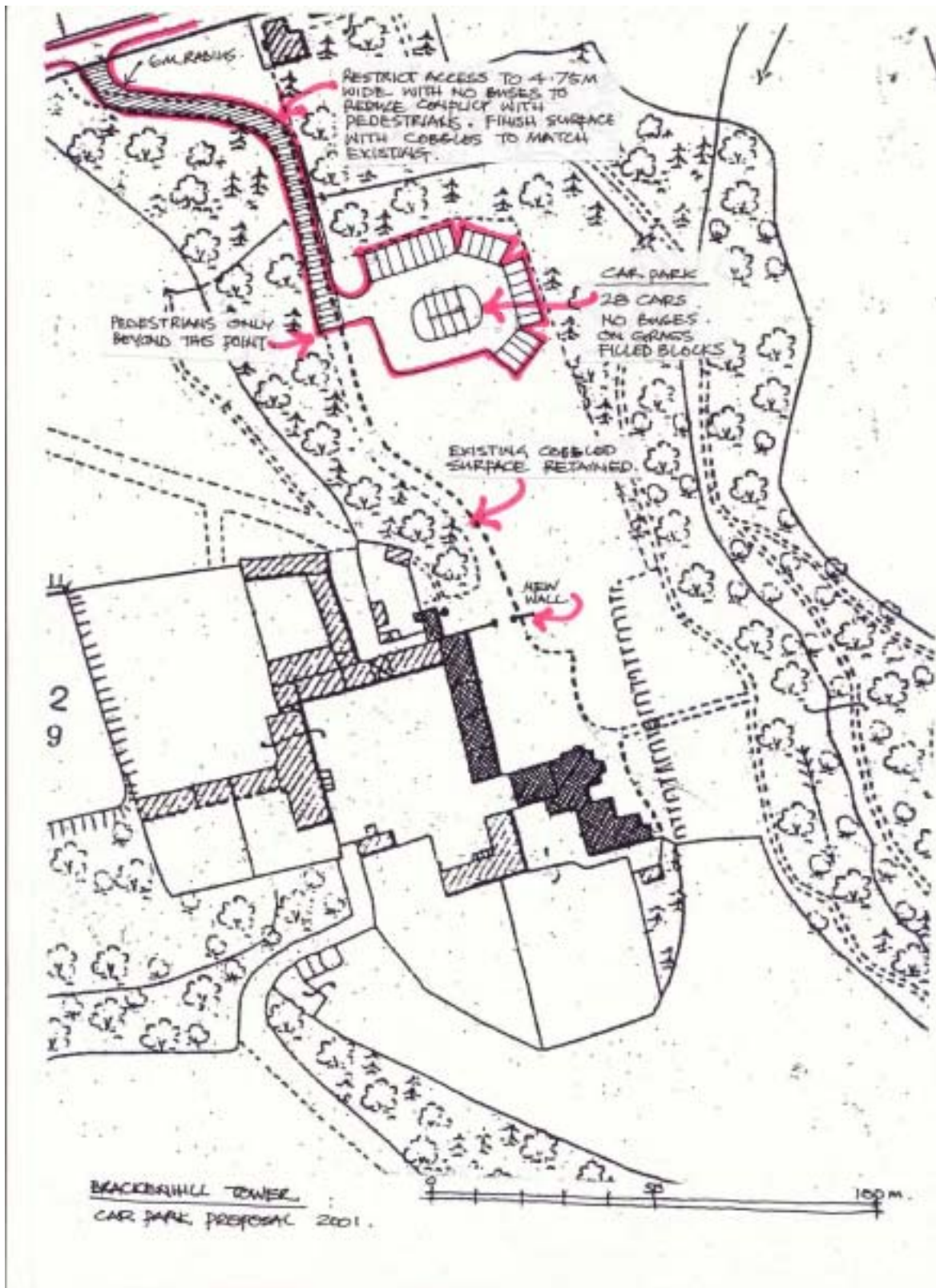
all of the remaining cobbled drive up to the entry into the parking area along with the wooded verges. (Note also that the cobbled use to run straight to the gatehouse but that it was truncated to enable the gatehouse to have an enlarged garden.)

2. In the 1997 proposals the new entrance to Brackenhill Tower was to have stonewalls flanking it. These walls are not shown on the plans and in order to satisfy the angled sight lines required by the County Highway engineers they may also remove some of the trees.
3. Along first 100 metres of the new 6 metre wide access road there is the potential for conflict between visitors arriving by foot and cars and buses due to its dual use. To avoid conflict a foot path would be needed on one side of the road and this extra width would remove even more trees destroy the present feeling of mystery and enclosure produced by the closeness of the trees and their over hanging branches.
4. The existing historic cobbled drive is 210 metres long extending from just outside the ditch to the Tower. In its present condition it easily takes foot traffic. If the 1997 proposals were implemented and this route became the service route then it would have to be strengthened by laying a minimum 150 mm thick layer of crushed material as a finish throughout its full length. In our view this would be an unacceptable loss of the historic existing cobbles.
5. The “causeway” across the ditch is a 19th century feature associated with the enhancement of the Tower and estate. It would be destroyed if it were widened and consolidated to allow buses to use it. Guard rails would be necessary to warn drivers of the drop on either side and they would automatically reduce the historic significance of this feature. On the other hand if the causeway was reserved for foot traffic then minimal changes would be required and it would maintain its character and also that of the cobbled drive, which together lead the unsuspecting visitor along this wooded tunnel to a point where the warm sandstone Tower suddenly appears - if this solution were possible then considerable benefits are to be gained for the Brackenhill experience.
6. In the Planning Application drawings the footprint of the proposed car park extends beyond the east boundary of the 19th century Paddock into the old woods and on to the steeply sloping ground. This could be overcome by redesigning the car park to ensure it stayed within the Paddock boundaries. However, the main consequence of the proposed location for the car park is that the Paddock’s identity will be lost for all time, especially as there is a requirement to excavate the site to a depth of 600 mm before laying the consolidated sub-base and finishing with a crushed surface.
7. Although two buses are shown in the car park it is doubtful whether they could in practice gain access without increasing the car park’s size and the turning radii of the access road. One bus might be able to enter the car park but if there were any obstacles it might not be able to be manoeuvred out of it and this is in addition to conflicts with pedestrians.

As part of the 1997 landscape proposals was the provision of new battlemented walls with stone pillars to create a gateway adjacent to the former Smithy. This is a beneficial proposal and if the wall could be extended even further to the east it would define the cobbled forecourt flanked by the Long Barn and terminated by the Tower and Hunting Lodge. This extended wall, although allowing a long view from the car park to the Tower, would minimise the impact of the car park on views from the Tower back towards the Paddock and woodland.

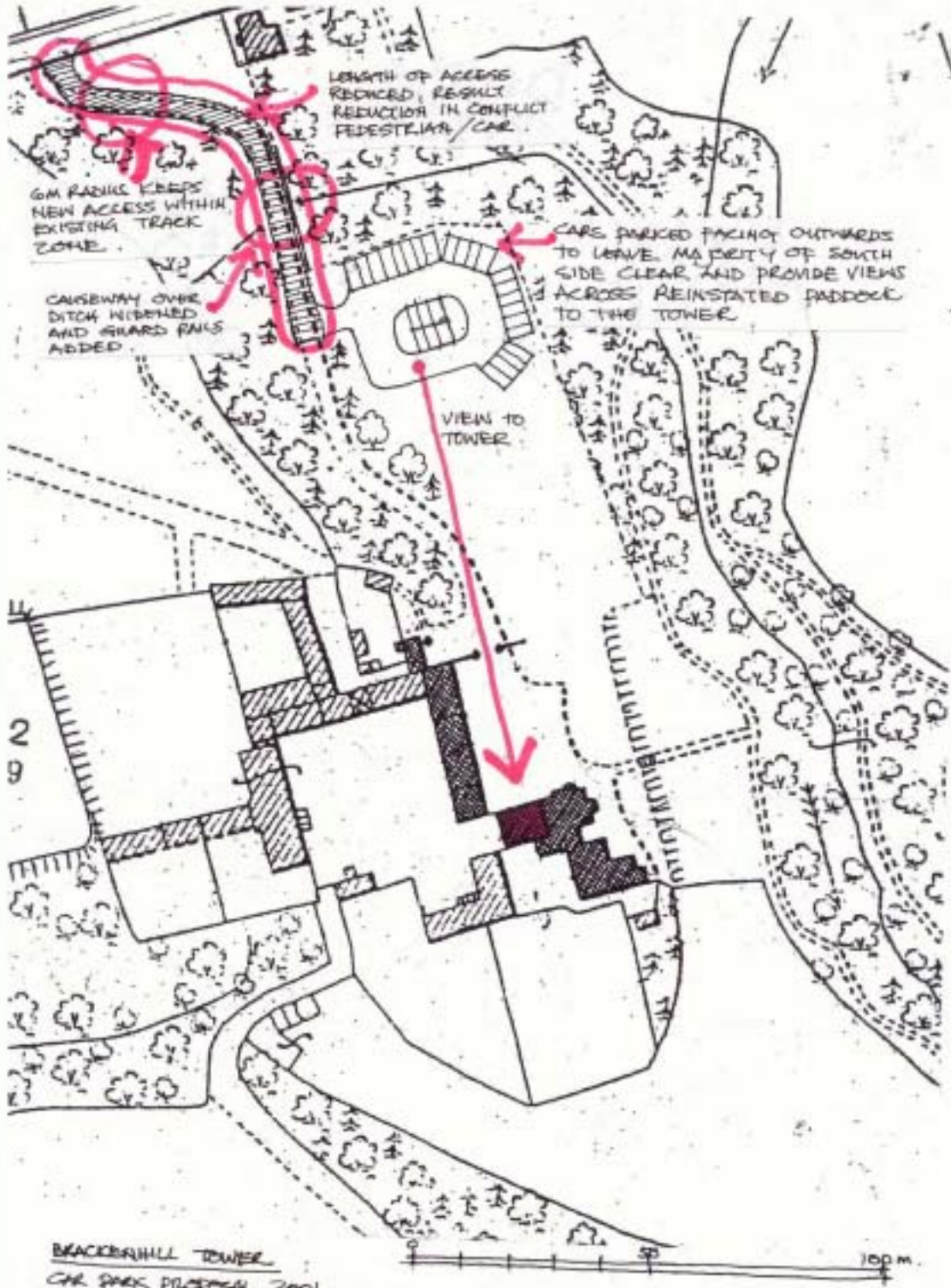
Our conclusions (to be read with drawings ‘Car Park Proposal 2001’ and ‘Car Park Proposal 2001: Analysis of Conflicts and Benefits’) are as follows:

1. The vehicular access to the Tower should be either separated from the pedestrian by locating it in the farm, or, minimising conflict between pedestrians and vehicles by reducing the length of the access to the car park.
2. If the contours and site boundary would allow it, the best solution would be to have any parking immediately on entering the site. This requires further analysis, in the meantime however, our proposals, whilst retaining the parking in the Paddock have moved it as far as is possible from the Tower.
3. It is essential that no buses be allowed to enter the site. They are incompatible with



the proposed access and they should park in an area obtained from the next-door farm.

4. We have accepted the provision of 28 spaces as shown on the Planning Application drawings, but with extreme reluctance not having detailed surveys of the land adjacent to the public highway.
5. The most beneficial solution would be not to have any cars on the site.



BLACKHILL TOWER
 CAR PARK PROPOSAL 2001
 ANALYSIS OF CONFLICTS
 AND BENEFITS

The 1997 Proposed Building Works: A Commentary

Each of the drawings included in the 1997 Development plan only covered a small area of the overall complex and consequently it is difficult to understand them unless they were physically pieced together, therefore we use the drawings which formed the Planning Application made in 1999 to explain the earlier proposals as they are comprehensive and are more easily understood .

The Planning drawings were composed of :

Sheet 1: Existing plans of the Tower, Hunting Lodge and 1717 Farm House and a location plan

Sheet 2: Existing elevations of the Tower, Hunting Lodge and 1717 Farm House

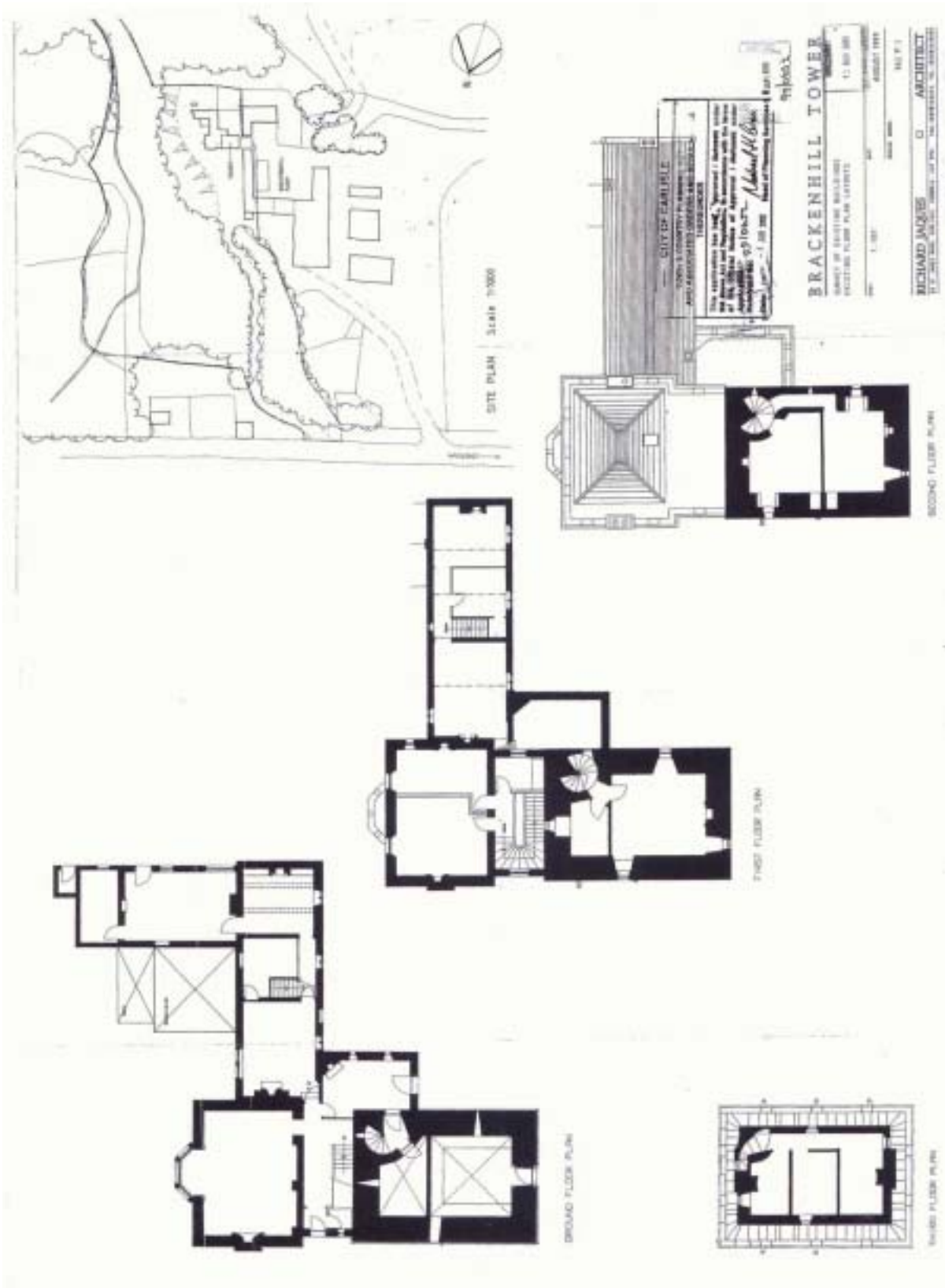
Sheet 3: Existing plans and elevations of the Smithy, Bothy and Long Barn

Sheet 4: Proposed plans of the Tower, Hunting Lodge and 1717 Farm House

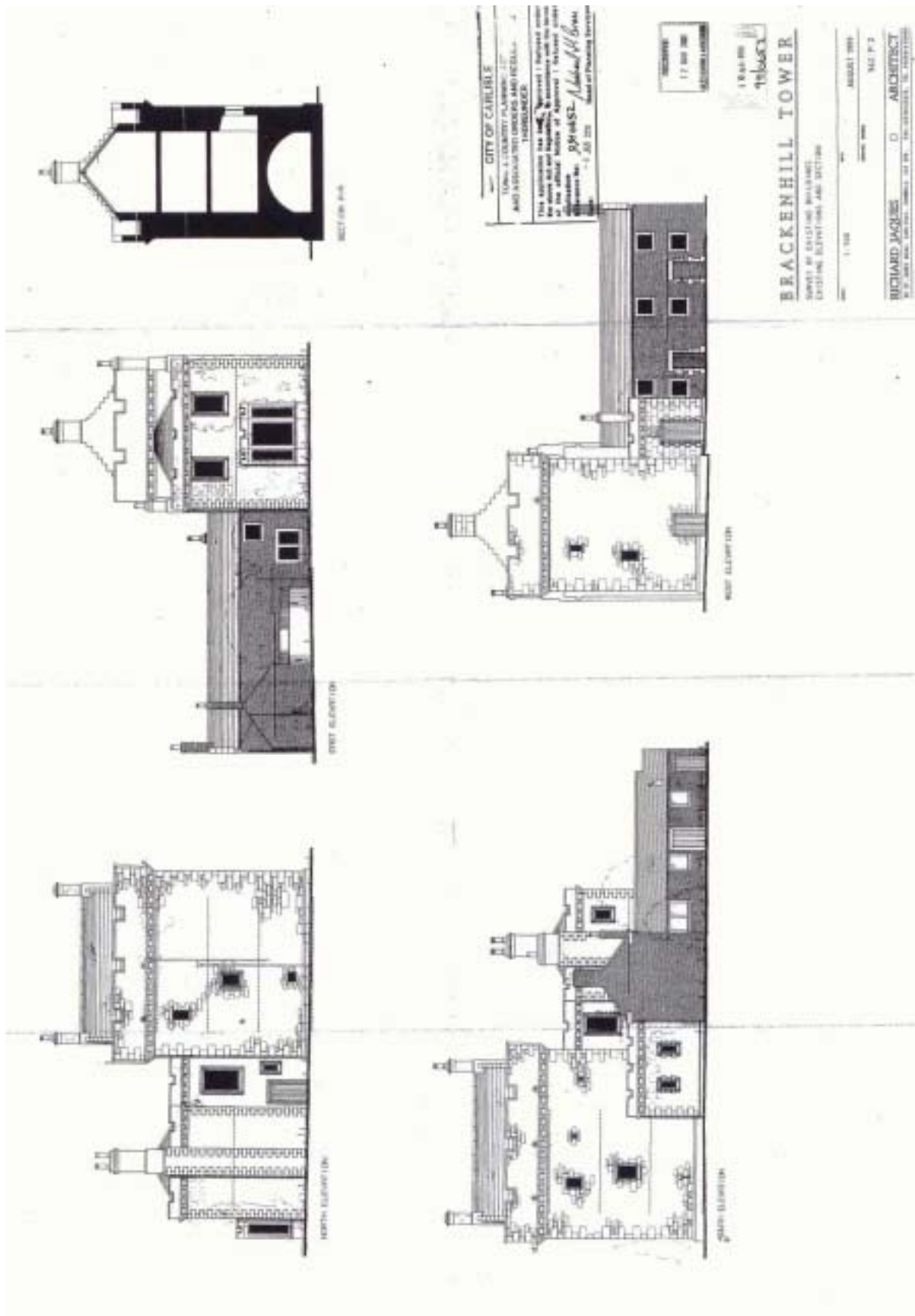
Sheet 5: Proposed elevations of the Tower, Hunting Lodge and 1717 Farm House

Sheet 6: Proposed plans and elevations of the Smithy, Bothy and Long Barn

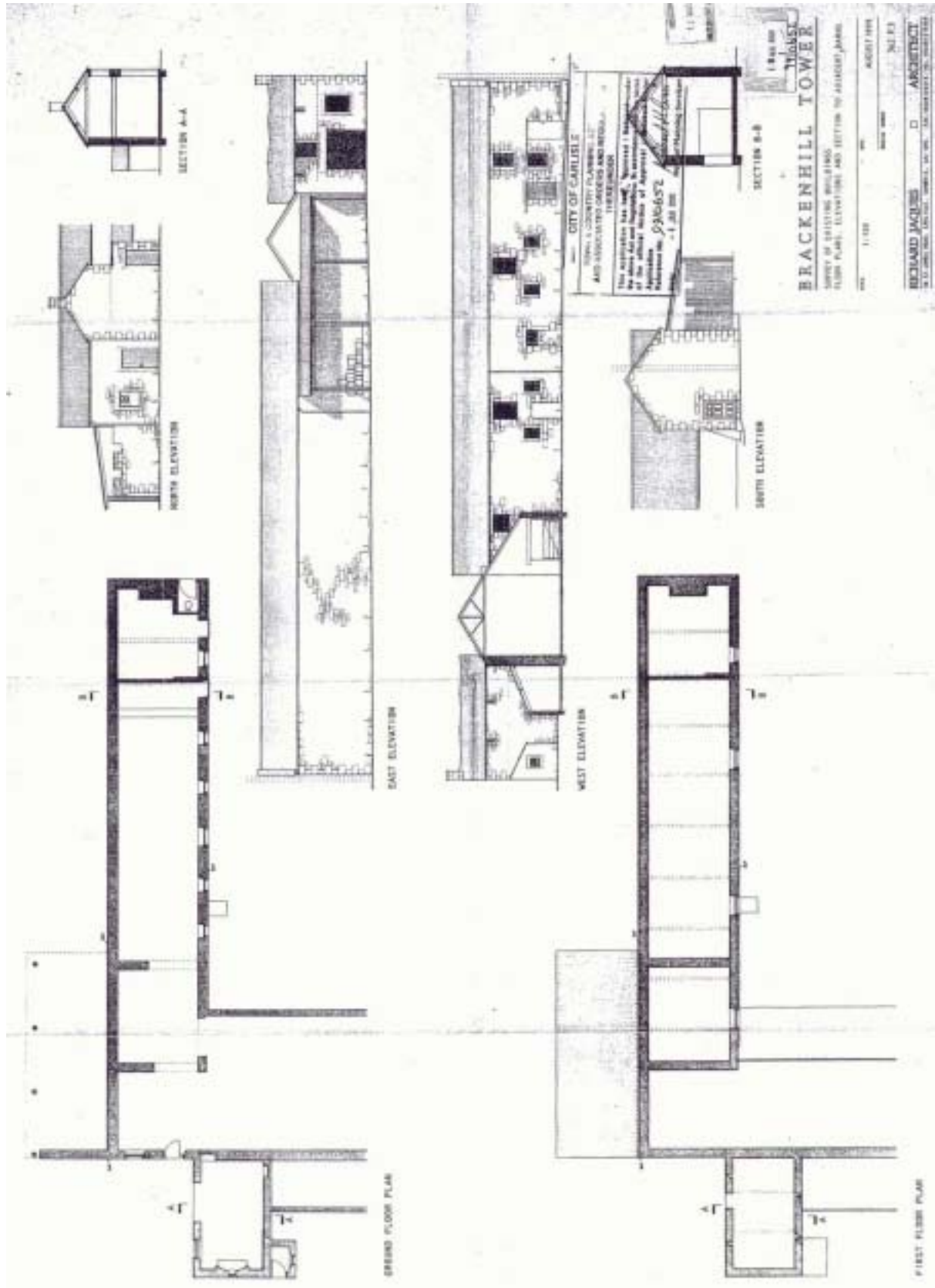
These plans are reproduced on the following pages.



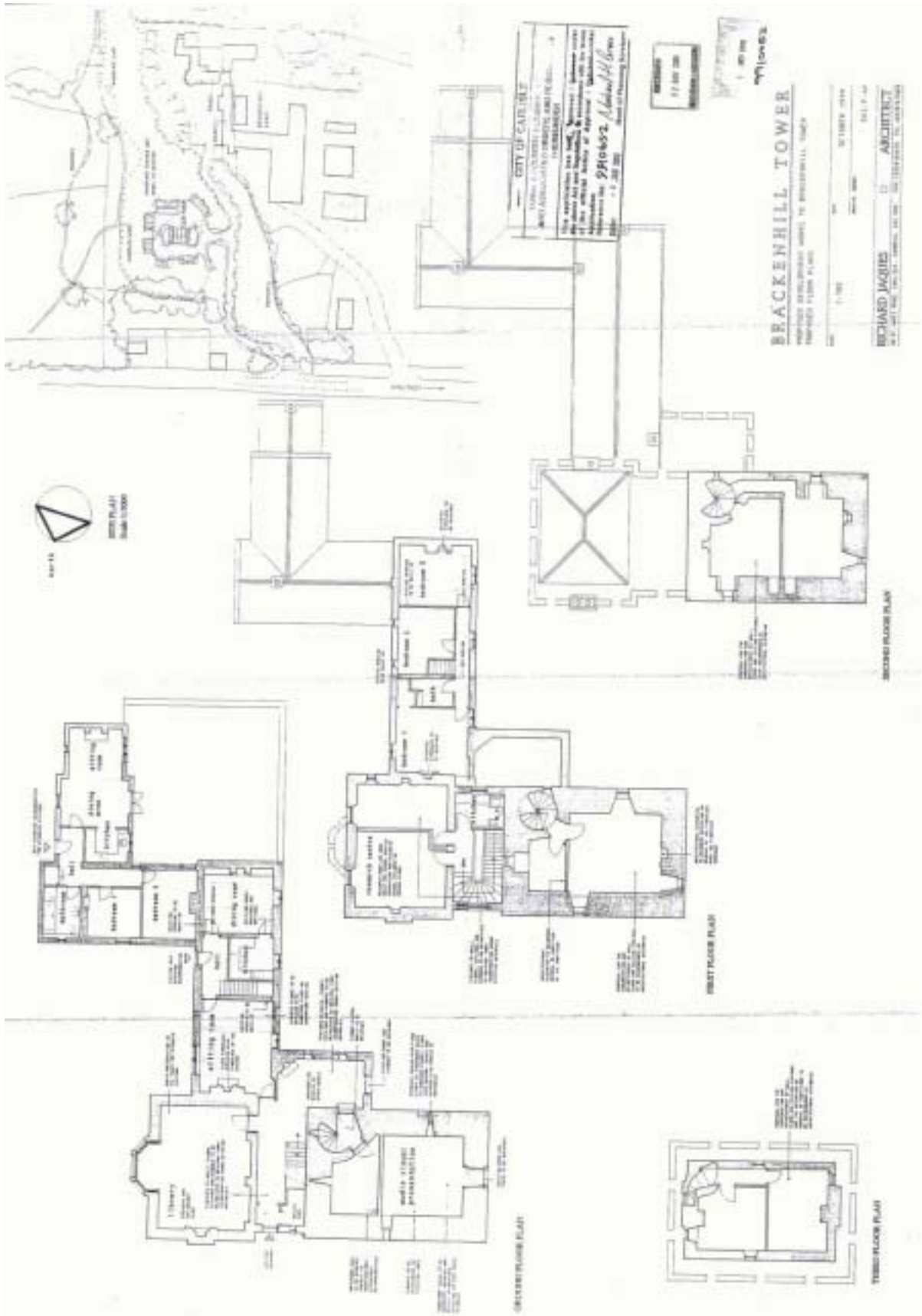
Sheet 1: Existing plans of the Tower, Hunting Lodge and 1717 Farm House and a location plan



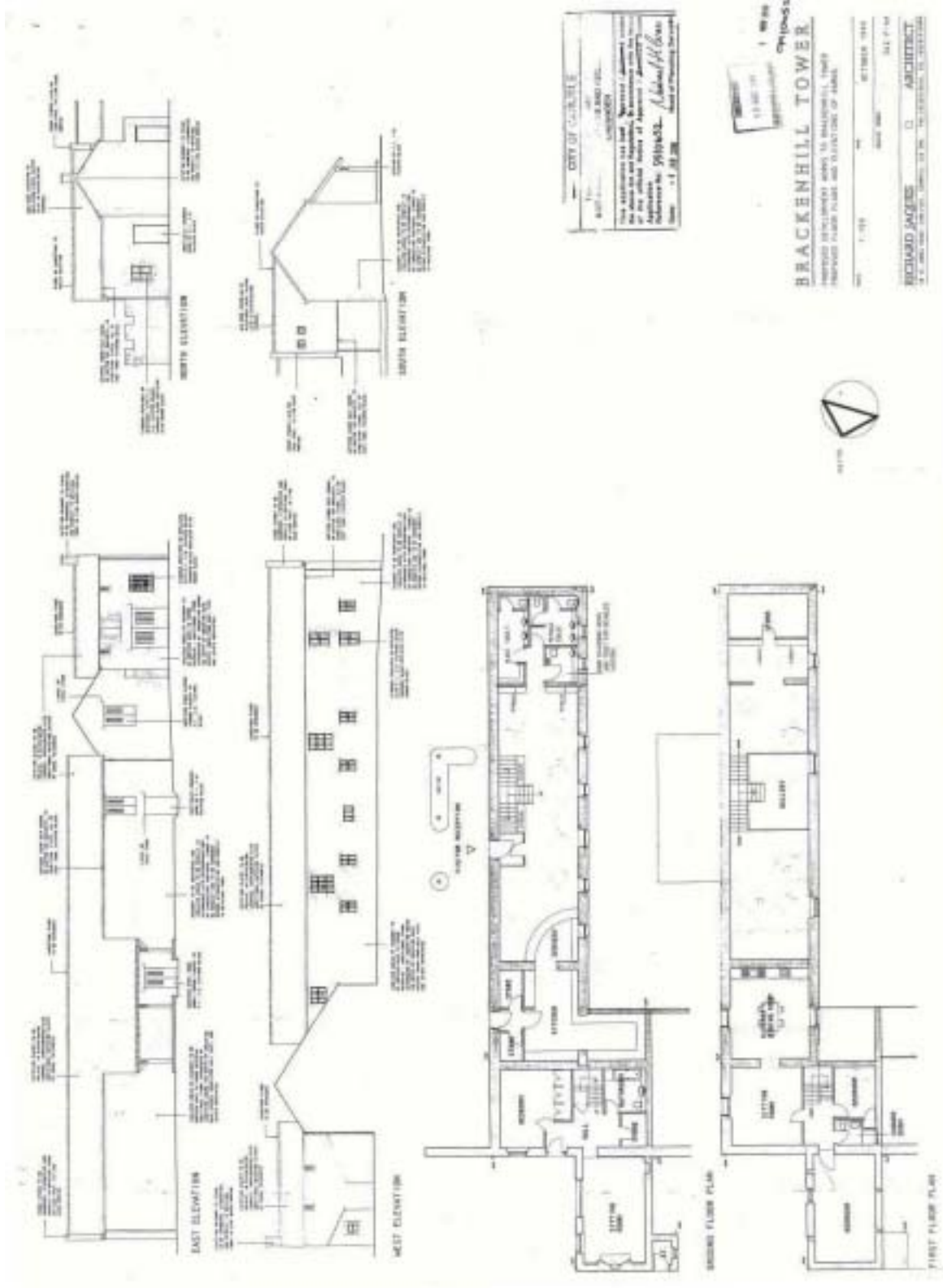
Sheet 2: Existing elevations of the Tower, Hunting Lodge and 1717 Farm House



Sheet 3: Existing plans and elevations of the Smithy, Bothy and Long Barn



Sheet 4: Proposed plans of the Tower, Hunting Lodge and 1717 Farm House



Sheet 6: Proposed plans and elevations of the Smithy, Bothy and Long Barn

The Tower, Hunting Lodge and 1717 Farm House

The majority of the proposed structural changes are sensible and generally would benefit the buildings. However, we do have reservations regarding the proposal to demolish the battle-mented brick out buildings abutting and adjacent to the 1717 Farm House without an obvious additional benefit to the complex as a whole. Our reservations are further reinforced by the need to supplement their loss by constructing an extension to the Farm House. Our view is that every effort should be made to conserve and identify a use for the existing buildings before contemplating any demolitions or new buildings.

Similarly we accept the majority of the repairs listed in the 1997 Development Plan's Schedules of Repair and Development Works. There are three main exceptions.

It is proposed that the existing stone flagged ground floor of the Tower is taken up and then re-laid on a new concrete slab. In our opinion it is better to leave the flags for they presently enable any ground water below the floor to evaporate freely into the air via the stone joints. If a concrete slab and damp proof membrane are introduced they immediately stop the evaporation process and divert the waters to the outer walls of the Tower and thereby increase the quantity of water in the wall fabric which is attempting to evaporate into the air. At the top of this evaporation zone damage can occur to the sandstone through erosion associated with the evaporation process of the ground waters, and with the additional quantity of water the damaged area can be pushed further up the wall. If the existing floor is left and the status quo is maintained and the potential for further damage to the wall fabric is minimised. Also, if a concrete slab idea were pursued as far as Building Regulations then because this is a material change to the floor a modern construction would be required with hardcore, the concrete slab and insulation with the added possibility that the new construction would have to go below the level of the Tower's foundations – this in turn adds further complications of underpinning and additional expense.

The proposal to incorporate under floor heating in the Tower's ground floor slab is not practical, nor is it for the upper floors of the Tower. There are two possible methods of heating worth considering, either Victorian type radiators or convectors, both can be turned on and off depending on the frequency of visitors whereas under floor heating in such a heavy structure would just not produce the heat in time.

The proposal to replace the existing timber joist and boarded ground floor of the Hunting Lodge with a concrete slab has the same Building Regulation conflicts as those identified in the Tower. Damp proofing this floor should not be a problem because even if the existing brick cavity walls of the building do not have a damp proof course a chemical one could easily be provided. Our recommendation is that the floor is replaced in timber to match the existing. It might still be possible to increase the floor's insulation value by laying insulation between the joists. At the first floor the proposal to use steel beams and timber joists this is questionable, it would be better to repeat the original timber construction having taken precautions to avoid any repetition of the existing rot – this existing damage is caused by the general ruinous condition of the building and the consequent water ingress.

It would be possible to heat the Hunting Lodge with under floor heating located below the timber floor boards. We think that Victorian type radiators, which would be in keeping with the age of the Lodge, would have the added advantage of easily responding to the times of

activities.

The repair methods proposed for the 1717 Farm House are generally acceptable but for the proposed uplifting of the existing ground floor's stone flags and their replacement using a concrete slab. Exactly the same problems described above in relation to the Tower House ground floor would occur here therefore the existing floor construction should be maintained. We agree with the use of timber to repair and consolidate the first floor structure. There is a design constraint which is recognised by the previous proposals although not actually articulated in them, and in our opinion it is an important point which anyone considering any proposals for the Tower, Hunting Lodge and 1717 Farm House should be aware of.

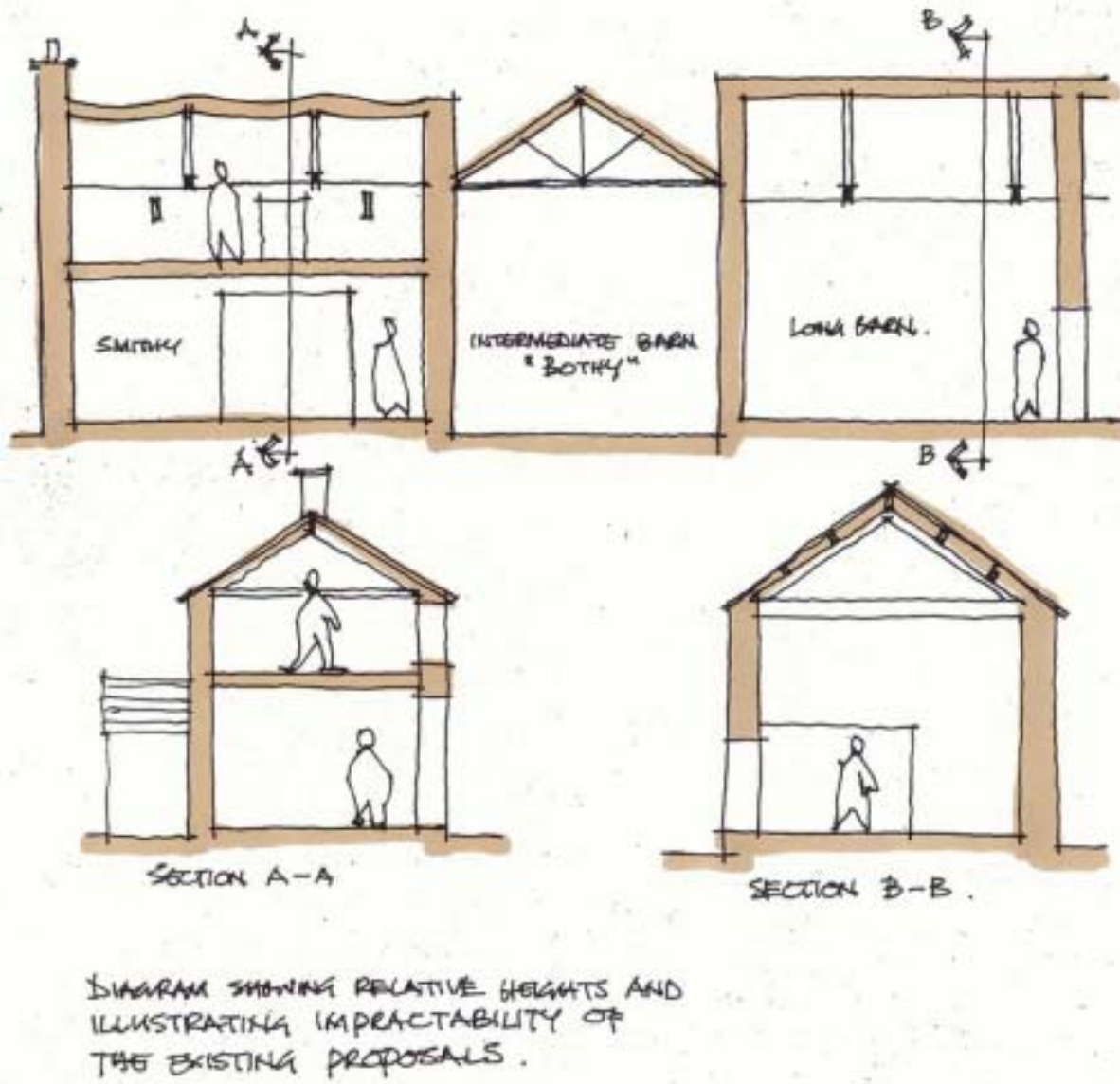


A cursory look at the plans could suggest that at first floor level cross access might be gained from one building to the next, this is impossible as the above analysis shows, the floor levels of the different parts do not coincide with each other and when combined with the restricted headroom make any cross circulation at first floor level impossible.

The Smithy, Bothy and Long Barn

The foregoing plans have received Planning permission but unfortunately they cannot work in practice and would not pass Building Regulations.

The existing heights of the three buildings are too low to allow the introduction of a second storey as illustrated by the sketches above. The overall height required for two floors is approximately 4.9 metres (2x 2.3M for each floor to ceiling height and 0.3M for the floor depth). In the Smithy the floor to ceiling height is 2.6M, but the attic has only 1.4M to the



underside of the roof trusses. In the Bothy the height to the trusses is 4.4M and in the Long Barn the height is 4M.

These facts have gone unnoticed because although in the survey drawing (Sheet 3) included in the Planning Application has a section through the Bothy as part of the West Elevation, the same section is avoided in proposals given on Sheet 6 as it is only given in outline. Notwithstanding this omission of a section a perusal of the proposed west and east elevations Sheet 6 should have highlighted the problem. For, if for a moment we assume that the design solution had been practical, the proposal drawings ought to have shown the levels of the three roof ridges being approximately level and the roofs would have joined each other.

In view of the above it is obvious that any further proposals for these buildings must be restricted to the ground floor.

A comparison of the 1997 and 2001 proposals

To enable a comparison we have colour coded drawings showing the functions allocated to the different buildings by the two sets of proposals. From the two sets of plans it will be seen that there is now far less self-catering accommodation and that a greater area is given to display.

This is supported by the following table which lists the same functions as a percentage of the total area, it shows that the combined display and research area has increased from 46% to 60% and that the self-catering area has been reduced to 16%. Also it must be noted that in our proposals there are no demolitions or new building as we consider that in terms of enhancing the site the existing structures every effort should be made to retain them.

Minimal changes proposed for the Tower and the Hunting Lodge they are to be used for

	Display areas	Research areas	Self-catering units	Lavatories	Admin, stores, etc	Kitchen	Demolitions	New build
1997	38%	8%	36%	3%	2%	4%	6%	3%
2001	34%	26%	16%	4%	14%	6%	0%	0%

display and research and the actual divisions will be a matter of curitorial decisions.

In the 1717 Farm House it is proposed to have a total change from the self-catering function to mainly café-display areas with kitchen on the ground floor and committee rooms/light storage on the first floor. The ground floor arrangement has the considerable advantage during the summer months of having direct access to the south facing courtyard which could be used as an outside café and hub to the complex for it also has direct access to the Tower. One can imagine parents taking tea whilst their children enjoy the interactive displays.

Abutting the Farm House the brick battlement out building will be retained and made into a quiet workshop or classroom. The small brick structure near by should be consolidated and it could be extended in the opposite direction to the Tower to provide further workshops for traditional crafts

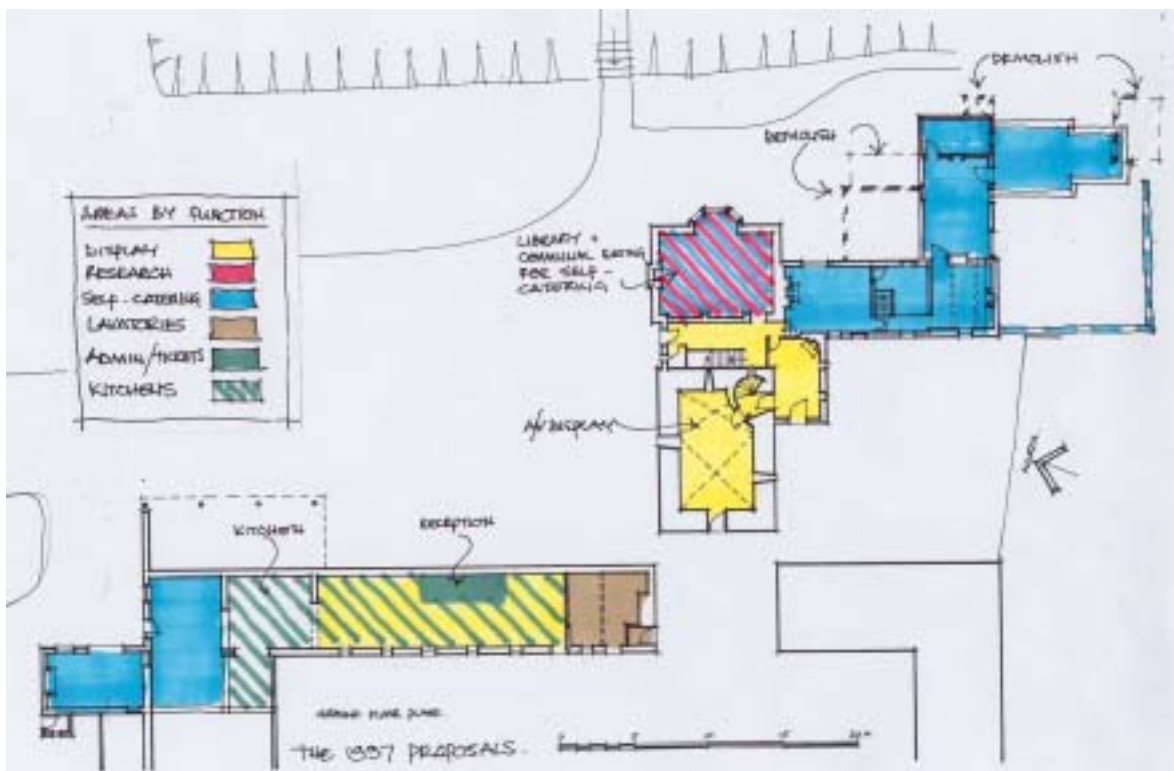
The problems and impracticability of the 1997 proposals for the Smithy, Bothy and Long Barn have previously been identified. Our proposal is to have tickets and sales in the Smithy with office administration next door in the Bothy and in the Long Barn self-catering accommodation. In this location the accommodation should be able to be serviced efficiently either through the new gate or through the farm yard. The self-catering element as a proportion of the overall project has been reduced in size on the basis of the

statistics and projections given elsewhere in this report.

In the previous scheme the self-catering units were at the extremities of the site. At the south end it was proposed to demolish the small outbuilding and construct a new “wing” to the Farm House, were this to be carried out the extension would stop anyone being able to walk around the Tower and so appreciate it from all four directions, an aspect which we consider is an essential element of the site qualities.

1997 Plan showing proposals at ground floor

1997 Plan showing proposals at First Floor

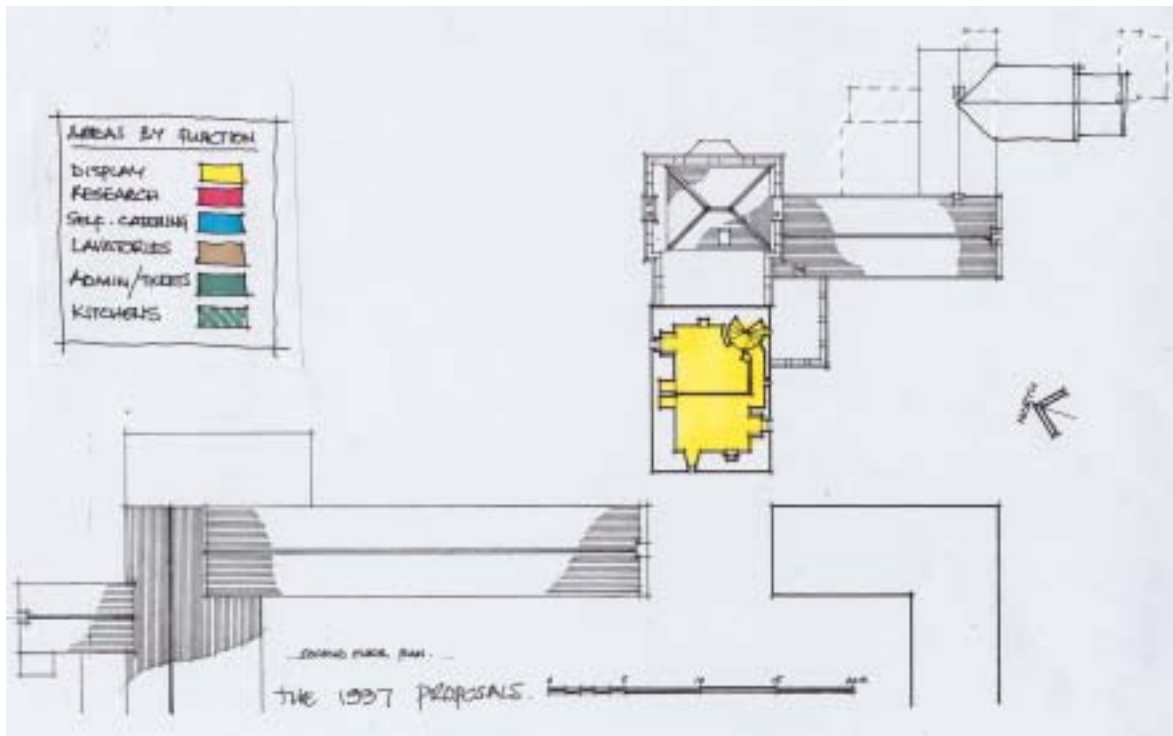


1997 Plan showing proposals at Second Floor

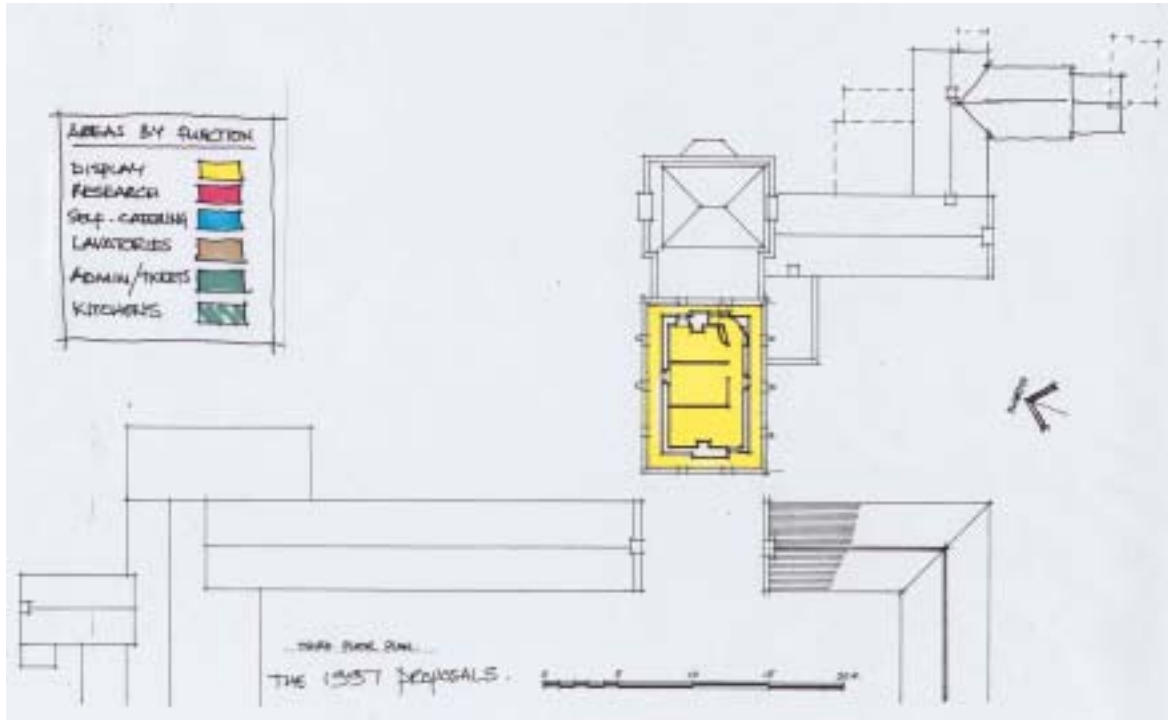
1997 Plan showing proposals at Third Floor

2001 Plan showing new proposals at Ground Floor

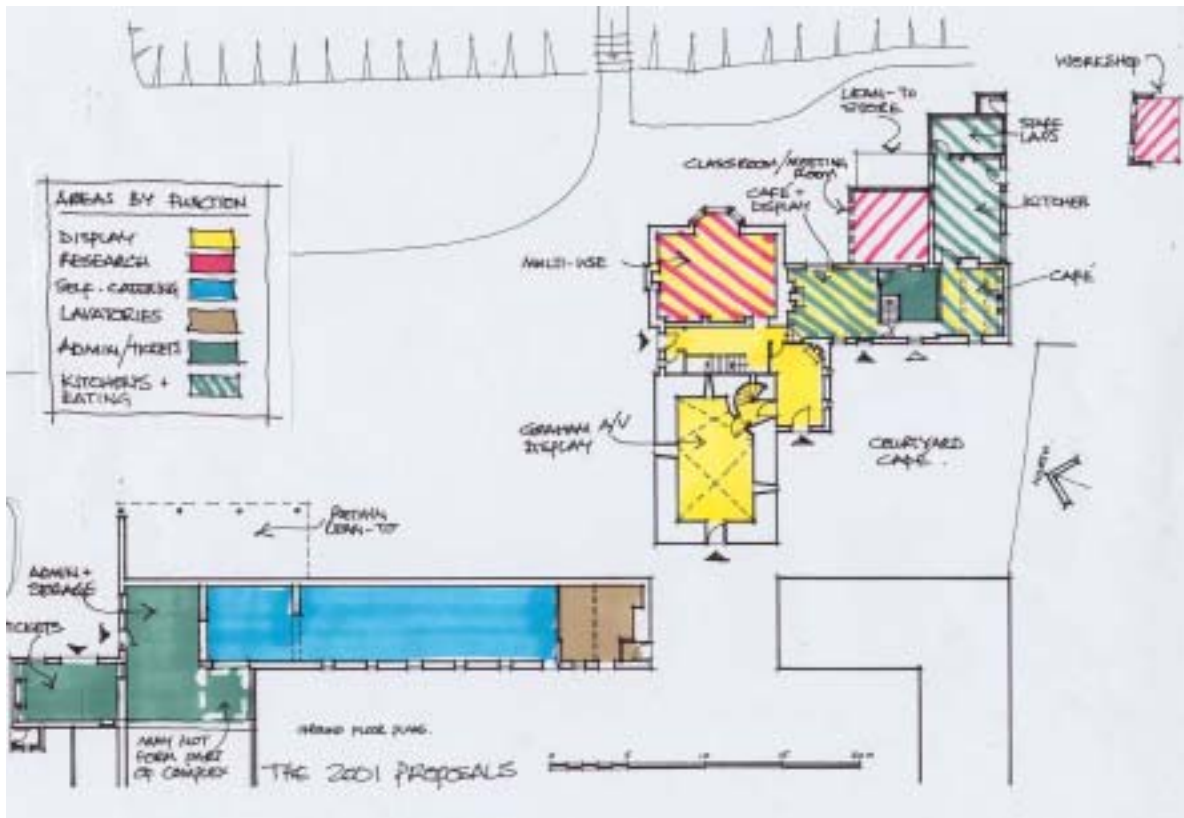
2001 Plan showing new proposals at First Floor

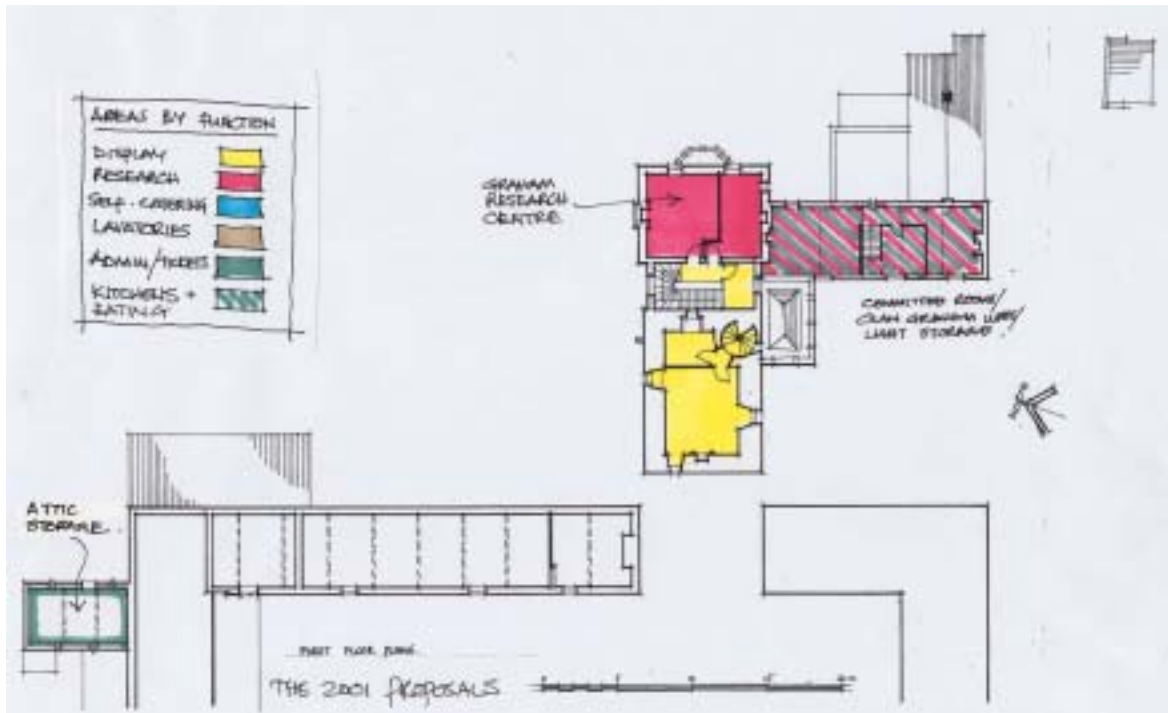


2001 Plan showing new proposals at Second Floor



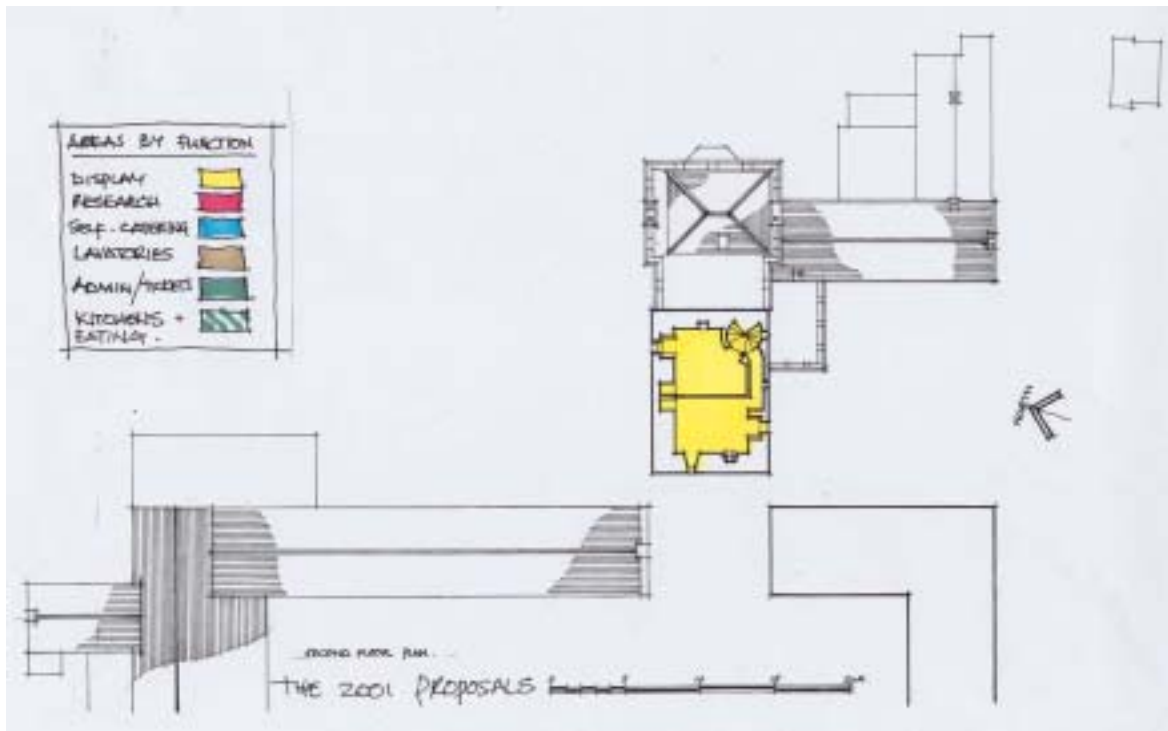
2001 Plan showing proposals at Third Floor.



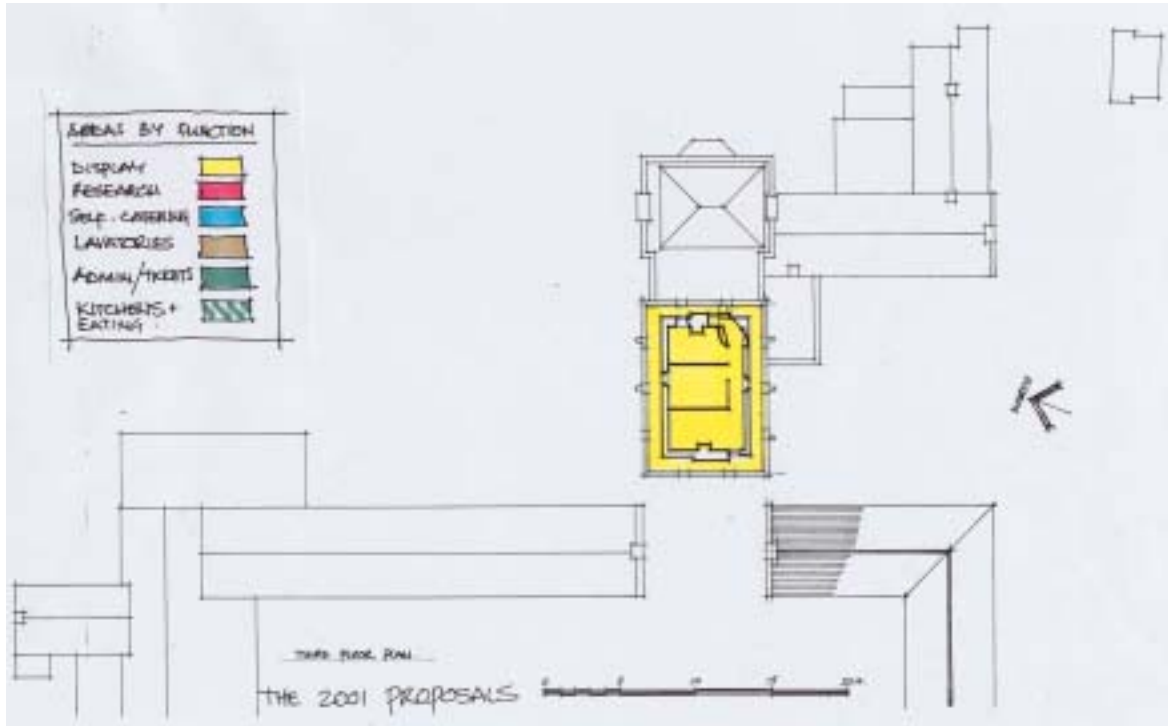


The 1997 Restoration Project Costs

A total project cost of some £1,474,400 was anticipated in order to cover Access, Landscaping of the Site, and the Repair and Development Works to the Long Barn, Tower,



Hunting Lodge and 1717 Farm House. This figure excluded site acquisition, VAT, marketing and stock purchases and professional fees. Using the Building Construction Indices multiplier the increase in costs since May 1997 to May 2002 is 32%, the equivalent



of £471,680 and produces an adjusted total of £1,946,080. However, the 1997 figures are considered to be an underestimation of the building costs which would be required and the more realistic figure of £3,700,00 (including site acquisition, VAT and professional fees) has been provided by Kenneth Ferguson and Partners, Chartered Surveyors (see Appendix F).

SECTION 4
THE MARKETS

The Markets

The 1997 Development Plan prepared by Ray Hopper Associates (YHA) describes the then prevailing situation as, “*The current regional tourism environment and tourism business economies are still fragile.*” While this refers to Cumbria as a whole, it is borne out by a Cumbria-wide series of tourism economic impact study reports prepared for the Cumbria Tourist Board and the Cumbria Local Authorities by Global Tourism Solutions (UK) Ltd, and a three-year trend summary of the rural area of Carlisle, an extract of which is attached at *Appendices B.1 and B.2*. *Appendix B.1* illustrates the relative impact and seasonality of 2000, together with three-year trend values. *Appendix B.2* illustrates the year-on-year seasonality and the relative impact changes, the Day Visitor economic impacts remaining static, and the visits by tourists using Non-Serviced Accommodation continuing to decline.

It is clear that as a result of the Cumbrian outbreak of Foot & Mouth Disease there are residual negative impacts anticipated, especially caused by a loss of confidence by the tourist industry and confusion and uncertainty in the minds of the potential visitor. While no hard evidence is yet available there is a growing belief, possibly only hope, that recovery will take place over a two/three year period with a better prepared industry to meet demand growth.

In December 1998, the North West Development Agency, together with the Cumbria and North West Tourist Boards, published the paper, “*A Framework for Growth*”. This paper considers, “*the importance of tourism in the Regions*”, “*prospects for growth*”, “*priorities for growth*”, and how to address such priorities in the context of “*Market Opportunities*”. Given the successful realisation of such “*Market Opportunities*”, it forecasts that between 1997 and 2006 Tourism in Cumbria could grow by 25%. It is in the context of such then prevailing thinking that the RHA Development Plan was written in June 1997.

The World Tourism Organisation prepared a report concerning the events of 11 September 2001: “*Tourism after 11 September 2001 : Analysis, remedial actions and prospects*”. This thorough and lengthy document considers the instability caused in the regions of the world and in the various tourism industries. It refers to, “*A remarkable general consensus regarding the impacts on markets emerged*”. In summary:

- Countries involved or perceived to be involved in the conflict or close to it will be avoided.
- Destinations perceived to be safe will be actively sought by consumers.
- Countries, cities or regions which are over-dependent on the North American market will suffer disproportionately.
- Countries which can be reached by land transport will have an advantage over those for which air travel is necessary.
- Short-haul intra-regional travel will grow faster at the expense of long-haul.
- Independent holidays will fare better than packages.
- Visiting friends and relatives (VFR) and domestic tourism will flourish.

In contrast it identified the need for better knowledge. This crisis has, more than any other, led to some extremely **inaccurate evaluations** of its impact on tourism based on incomplete data. Unfortunately, crises also tend to breed pessimism, a type of self-reinforcing pessimism fed to the public, mainly because the public like to read or hear it. This can be exacerbated by lobby

groups doing their job of fighting for their members' interests. At times like this, the loudest voices dominate the headlines, and the overall perspective becomes unbalanced.

In brief, the analysis is:

The tourism industry has developed a **capacity to adapt and survive**. Tourism has an extraordinary **resistance** and an ability unmatched by any other industry to overcome crises.

In the decade from 1990 to 2000, international tourism as measured in arrivals grew at an **average rate of 4.3 percent a year**.

The 11 September terrorist attacks have had a more dramatic impact than any other crisis in recent years. This has generated hesitation and a certain **fear of travelling**, and an atmosphere of **uncertainty**, made worse by the **weak international economic context**.

The first reaction from tourists was to return home as quickly as possible. Then followed a wave of **cancellations**.

Overall **weakness in new reservations** and a **tendency to postpone** the decision to travel.

This crisis has had a severe impact on **long-haul tourism**, and **carriers**. The results, on top of an already weakening economic situation, have been business closures, reduction of capacity, reduced working hours, and job losses.

Although the whole sector is suffering from the current situation, **not every destination and every part of the industry has been as badly affected**. Travel in the same region (80 percent of all international arrivals) and domestic tourism, travel by road and rail (50%), and individual trips seem to have resisted the crisis much better or even benefited. A special resistance can also be found in segments with a strong motivation, e.g. sports, culture, social tourism and rural tourism.

An important part of the actions taken by governments and by the industry has been aimed at rebuilding **consumer confidence**.

Clearly, events in 2001 are likely to have continuing effects in the short term with eventual improvements in the mid to long term. It is, therefore, prudent to re-examine more recent trends, both for England and Cumbria, details of which are now available, since the earlier development plan was delivered. The following four tables, 1.1 – 1.4, are extracted from UK Tourist Statistics 1999 which was issued in July 2000.

Table 1.1: National Trends 1993 – 1998: Holiday Trips in England

Table 1.2: Use of Tourist Accommodation by Type 1999

	SHORT HOLIDAY TRIPS		LONG HOLIDAY TRIPS	
	1-3 nights (Millions)	% Self-Catering *	4+ nights (Millions)	% Self-Catering *
1993	19.7	11	23.0	18
1994	25.5	10	23.9	16
1995	27.7	8	25.0	15
1996	26.2	9	23.9	15
1997	30.6	9	25.3	15
1998	28.4	9	23.4	16
1999	34.7	8	26.5	14

Table 1.3: Months in which Trips Occurred by Percentage

	Short Holiday Trips 1-3 nights	Long Holiday Trips 4+ nights
Total commercial accommodation	45%	65%
Total non-commercial accommodation	55%	38%
Total serviced accommodation	29%	23%
Total self-catering accommodation	16%	43%

Table 1.4: Average Duration of Trips 1999

	Short Holiday Trips 1-3 nights	Long Holiday Trips 4+ nights
January	5%	1%
February	7%	2%
March	7%	5%
April	9%	8%
May	10%	9%
June	9%	9%
July	9%	17%
August	10%	25%
September	8%	9%
October	9%	7%
November	7%	3%
December	11%	7%

Table 1.5: Socio-Economic Groups 1999

	Short Holiday Trips 1-3 nights	Long Holiday Trips 4+ nights
	1.9 nights	7.1 nights

* Self-catering as specified using rental accommodation in flat/apartment/house/chalet/villa

The UK Tourist Statistics publication, which is published for each calendar year by the Na-

	Short Holiday Trips 1-3 nights	Long Holiday Trips 4+ nights
AB	27%	22%
C1	33%	32%
C2	21%	22%
DE	19%	25%

tional Tourist Board, serves its purpose well as a source of national and even regional statistics, but for a variety of reasons does, from time to time, offer unexplained “blips” which makes it less reliable as a trend indicator. However, if “rolling” averages are employed, the 1993 – 1999 figures in Table 1.1 indicate an underlying and sustained growth in Short Holiday trips and a slower growth rate for Long Holiday trips.

Table 1.2 indicates that Short Holiday trips are more likely to be spent with family or friends, but are evenly distributed throughout the year. Long Holiday trips are more seasonal peaking during July to September, however are just over double the total number of trips with an average duration of 7.1 nights as opposed to the average duration of Short Holiday trips of 1.9 nights.

When considering the seasonality of tourism in the rural area of Carlisle, the self-catering seasonality is evidenced in Table 2 below.

Table 2: Self-Catering Bed Stock and Occupancy 1998 - 2000
Carlisle Rural Area (Source: GTS STEAM Reports 1999 and 2000)

Tourist Day Visitors will be the largest target area for the Brackenhill Tower project. Although this, too, is a seasonal target market evidence of the years 1998 – 2000 indicates that it is stable.

Year	Low Season		High Season	
	Stock (Jan)	Occupancy %	Stock (Aug)	Occupancy %
1998	344	45	372	86.3
1999	344	19.2	372	79.5
2000	480	22.8	504	81.6

Table 3: Tourist Day Visitor Numbers 1998 – 2000
Carlisle Rural Area (Source: GTS Steam Reports 1999 and 2000)

Totals may differ due to rounding

In addition to the Tourist Day Visitors identified in the above tables, Tourist Day Visitor being defined as a visitor travelling for a non-routine purpose from outside of the area in ques-

tion and for a period longer than three hours, there is a large body of Leisure Day Visitors which may, too, become part of the project's target market. The United Kingdom Leisure

	1998 (Thousands)	1999 (Thousands)	2000 (Thousands)
January	21.7	22.7	22.7
February	23.3	24.3	24.3
March	28.8	30.2	30.2
April	53.0	55.8	56.2
May	62.5	56.7	59.6
June	59.6	62.6	55.9
July	87.6	89.4	91.7
August	96.0	102.9	95.6
September	63.9	60.3	54.5
October	44.3	51.0	47.1
November	22.5	23.5	22.1
December	17.1	17.9	17.9
TOTAL	580.0	597.0	578.0

Day Visitor Survey 1999 indicates that the area within the responsibility of the City of Carlisle benefits from nearly 2 million Leisure Day Visitors. Work undertaken in 2000/2001 by the National Trust, concerning the economic impact of their properties in Carlisle, indicates that the likely catchment areas for such visitors are: the North West 37%, Cumbria 31%, Yorkshire 15%, the North 9%, Scotland 2%.

SECTION 5
ECONOMIC APPRAISAL

Economic Appraisal

■ Introduction

In the RHA Development Plan, 1997, “Section 9, Impact Assessment” considered the economic impact, income multiplier, environment impact, site conflicts and project outputs. The multiplier effects were based upon the Scottish multipliers which were created by the Surrey Group on behalf of the Scottish Enterprise Network. The Surrey Group was led by Professor Stephen Wanhill, a Director of Global Tourism Solutions (UK) Ltd. While we are satisfied with the calculations made, GTS (UK) Ltd owns and operates the “Scarborough Tourism Economic Activity Model (STEAM)”, and has data available for all the Local Authorities in Cumbria, 1998 – 2000, and is now contracted to provide further reports for 2001 – 2004. The STEAM report for Carlisle City Council for the period 1998 – 2000 consists of an overall report and for two sub-zones, “Urban” and “Rural”. The trends analysis element of the latter is attached at *Appendices B.1 and B.2*.

■ Tourism Impacts 1998 – 2000: Carlisle Rural Area

The relative impacts and the seasonality illustrate clearly relative impacts of both the Day Visitor (40%) and the Visitor using Serviced Accommodation (18%), and highlights, in graph form, the relevant peaks and troughs. The Bar Charts indicate a relatively stable situation over the three years. *Appendix B.2* indicates graphically the seasonality by month in the Carlisle Rural area in respect of: Economic Impact, Employment, Tourist Days and Tourist Numbers. The full detailed STEAM reports, on a month-by-month basis for the period, are not included but are available to the Trust with the permission of Carlisle City Council.

■ Economic Impacts of Day Visitors

Appendix C sets out the estimated economic impacts of the RHA-projected 30,720 Day Visitors to the project. By use of the existing STEAM data for Carlisle, it is possible to quantify the benefiting sectors of the local economy by type of visitor, how many of them, how long they stayed, and how much employment in terms of Full-Time Equivalents (FTEs).

If all of the 30,720 visitors to the Brackenhill Tower were to be new visitors, as a result of its activities alone, the total benefit, including direct and indirect effects, is estimated to be just over £750,000, (the calculated confidence level of the STEAM model is plus or minus 10%), and would generate nearly 14 FTEs.

As it is too early to identify how many new visitors are likely to be calculated, it would be best to express the contribution to the immediate economy as, “the likely contribution to supporting visitor spend of some £750,000, and towards the protection of an estimated 14 FTEs”. This may be overly conservative, but any calculation of market substitution at this stage would be highly speculative.

■ **Economic Impacts of Self-Catering provision of the Project**

Appendix D sets out the estimated economic impacts of the RHA-projected Self-Catering visitors to the project. These calculations are based on 3 units/14 beds, and the per week expenditure/occupancy which has been identified in producing Carlisle and Cumbria STEAM reports, 1998 – 2000.

Based on the above, it is estimated that 316 visitors would spend 2,446 nights per annum at the project, benefiting the economy by an estimated £82,000 and creating 2.75 FTEs. Because of the strong likelihood that the majority of these visits would be generated by the “Graham Clan” connections, this can be classed as “new” and not a “market substitution”.

As a caveat, it must be noted that, later in this report, other options for the project recommend that, initially, only one unit would be likely to be provided.

■ **Comparisons of Employment Impact Projections**

Table 4.1

Self-Catering, Brackenhill – 3 units/14 beds	
RHA 1997	GQ/GTS 2001
1.86 FTEs Direct & Indirect	2.75 FTEs Direct & Indirect

Table 4.2

Tourist Day Visitors to Brackenhill	
RHA 1997	GQ/GTS 2001
11.89 FTEs Direct & Indirect	13.97 FTEs Direct & Indirect

Table 4.3

Given the close correlation of the above figures, given the assumptions made using two

Total Estimated Employment Impacts	
RHA 1997	GQ/GTS 2001
13.75 FTEs Direct & Indirect	16.72 FTEs Direct & Indirect

entirely different methodologies, a high degree of confidence can be placed on these estimates.

SECTION 6
MARKETING AND PERSONNEL

Marketing and Personnel

Introduction

The RHA Development Plan, 1997, explores a variety of sub-themes in the context of a proposed “positioning” of the Brackenhill Tower project in a general Reiver theme. We suggest that more thought is needed, as it is **our belief that the over-arching theme is that of the Graham Clan, a great Border family**. This, coupled with significance of the English and Scottish West, Central and East Marches, will provide fertile subject areas for both interpretation and marketing.

This belief is borne out by the results of the Nominal Group Process, carried out on 21 November 2001, attended by Trustees, elected Members, Council Officers and other advisors. This process is designed to identify issues and to prioritise them.

The group was given the following statement and question:

“The Brackenhill Tower has the potential to contribute positively to its immediate area and the Carlisle region.

What issues must be addressed to ensure its successful and sustainable development?”

The group identified 51 issues and were then invited to choose, individually and without discussion, the top 10 issues and score them by importance out of 10 in descending order to 1. This process eliminated 18 issues, and the outputs are to be found in *Appendices A.1, A.2 and A.3*.

Appendix A.1 indicates the order, average scoring out of 10, and labels each issue in the following categories: Conservation and Heritage; Structure and Relationships; Operations and Site Management; Funding; and, finally, Marketing. The Trust can re-allocate the headings and, indeed, some issues can fall into two or more headings.

Appendix A.2 indicates the priority order given by the assembled group, and *Appendix A.3* groups them under the above categories.

Interpretation and Marketing

The interpretive context and marketing suggestions provided in the RHA Development Plan may or may not be adopted. Set out at *Appendix E* is, “An Aide Memoire: Elements of Marketing”, to assist the Trust in its future deliberations. It is not anticipated that all elements will be fully adopted, as set out, but they will certainly provide a firm basis for developing the concepts to plan options.

The Graham Clan

We believe that it is the Graham Clan, its activities, its members, and those interested in it, that core site development must be examined. Set out are just a few thoughts which have been indicated previously in sections 2 and 3.

- ⌘ The Tower must be restored as faithfully as possible to an early period in its existence. The visitor must have the sense and excitement of seeing the Graham home whilst the family are out on their lawful? Or reiving occasions, or even matters of State.
 - ⌘ The Victorian Shooting Lodge is an area where a library and archives could be located and where visitors could gather in small groups to meet, to be addressed, or to be taught.
 - ⌘ While the 18th Century cottages would be used to provide catering facilities, an administrative area, toilets and other meeting rooms, it is considered that Clan Graham could use the area as its administrative headquarters and for merchandising purposes worldwide.
 - ⌘ The Long Barn is now considered for development as a self-catering unit and storage.
 - ⌘ The Smithy is seen as a site management facility.
 - ⌘ The outer buildings to be renovated for use as training facilities in conjunction with external colleges and schools.
- The project development must be multi-phased and flexible in concept development and marketing. Initially, programmes will need to be conditioned by the process of site acquisition, likely to be:
- i. The Tower complex and relating buildings
 - ii. All the grounds and the Smithy
 - iii. The Long Barn

Related to this is the Wade “Barracks”, which, we believe, is the best development opportunity for self-catering development. Whether this is developed by Mr. Carlyle with the Long Barn, or by the Trust, is irrelevant as long as both primary parties realise that by close co-operation their exists better mid to long-term opportunities than previously realised.

■ **Personnel**

Because of some of the short-term uncertainties, we believe that the five-year projections prepared by RHA should be set aside and those suggested in section 7, “Operating Budget” be adopted. The factors which govern this recommendation is:

- ⌘ Commencement of operations, initially without self-catering facilities.
- ⌘ The provision of 1 self-catering facility instead of 3.
- ⌘ Only 1 full-time employee.
- ⌘ Adoption of payroll and accounts provision by an accountancy firm.
- ⌘ The adoption of realistic part-time and seasonal employment facilities.

- ⌘ Use of volunteer guides.
- ⌘ Reduction of catering facilities to basis provision.
- ⌘ For group catering for events, employment of external catering using the kitchen facilities as “stage kitchens”.
- ⌘ A recognition that the capital investment will not be successful if the revenue budget is not sustainable. It is better to expand expectations in the light of reality rather than crystal ball expectation.

SECTION 7
OPERATING BUDGET

7. Operating Budget

■ Introduction

In this section, it has been vital to establish an attainable and realistic income base and we believe that some of the earlier RHA estimates have proven to be over-optimistic. The tables which follow: *Table 5: Revised Visitor Income Estimates*, and *Table 6: Brackenhill Tower – Revised Five-Year Projections*, represent a more prudent approach which we believe to be realistic and achievable, together with a budgeted contingency provision for the “unexpected”. It should be noted that the provisions are spartan and should be re-visited in the light of practical experience. The Marketing and the Repairs/Renewals and Depreciation budgets should be among the first to be re-visited.

■ Visitor Income

Table 5: Revised Visitor Income Estimates, recommends considerable revisions to the RHA Development Plan. While the anticipated visitor numbers are accepted as reasonable expectations, the revenue achievement per head is regarded as over-optimistic. In the first instance, the individual yields expected are too high and do not take into account the discounting which inevitably must occur. For example, discounts for families, parties, senior citizens, young people, seasonality and promotions. The revised income per head is clearly set out in the table. Also, the self-catering provision has been reduced from 3 units to 1.

Table 5
Revised First Year Visitor Income Estimates

	Numbers	Income Per Head		Annual Income
		<i>Original</i>	Revised	
Day Visitors				
Coach/tours	1,720	£6-00	£3-00	£5,160-00
Blue Badge	2,000	£6-00	£3-00	£6,000-00
Other	1,000	£5-00	£2-50	<u>£2,500-00</u>
				£13,600-00
General Public				
Admissions		£2-75	£2-75	£33,000-00
Catering	12,000	£2-50	£2-00	£24,000-00
Retail spend		£1-15	£1-15	<u>£13,800-00</u>
				£70,800-00
Special Interest				
Admissions	2,000	£7-00	£3-50	£7,000-00
Self-Catering	1 unit	£370-00 @ 70% x 52 weeks (3 units)	£235 @ 55% x 52 weeks (1 unit)	£6,720-00
Events/Functions				
Responsive		£6-00		
Pro-active	2,000	£7-00	£5-00	£10,000-00
Weddings/Receptions		£12-50		
Year 1 Revised Total				£108,120-00

The principles set out at the end of section 6, and the Revised Visitor Income Estimates, set out in *Table 5*, have a major effect on the formulation of “Revised Five-Year Projections”, as set out in *Table 6* which follows:

Table 6: Brackenhill Tower – Revised Five Year Projections (£’s 2001)

	Year 1	Year 2	Year 3	Year 4	Year 5
Income					
Visitors	91,400	95,970	105,570	112,960	120,860
S/C	6,720	7,050	7,750	8,290	8,870
Events	10,000	10,500	11,550	12,360	13,220
Archive/Research		2,000	4,000	5,000	6,000
<u>TOTAL</u>	<u>108,120</u>	<u>115,520</u>	<u>128,870</u>	<u>138,610</u>	<u>148,950</u>
Expenditure					
Staffing	15,000	16,750	18,000	19,000	19,950
Catering	13,000	15,000	16,000	16,800	17,600
Others	13,000	13,650	15,000	20,000	21,000
Guides	1,000	2,000	3,000	3,500	4,000
Site Maintenance	5,000	5,000	5,000	5,000	5,000
Marketing	11,500	12,000	13,000	14,000	14,700
Commission	---	---	---	---	---
Printing/Stationery	2,000	2,100	2,300	2,450	2,570
Insurance	3,000	3,150	3,500	3,750	4,000
Trustees Liability Insurance	900	1,000	1,100	1,170	1,250
Repairs, Renewals & Depreciation	2,000	2,100	6,000	4,000	4,500
Service Contracts	2,600	2,750	3,000	3,500	4,000
Rates	3,000	3,150	3,300	3,500	3,700
Accountancy	3,000	3,150	3,300	3,500	3,700
Electricity, etc	3,000	4,160	4,350	4,600	4,850
Telephone	4,000	2,100	2,200	2,400	2,600
Sundries (postage, etc)	1,500	1,650	1,750	2,000	2,250
Stock - Retail	9,660	10,150	11,150	11,900	12,700
- Catering	9,600	10,100	11,100	11,800	12,600
Reenactments	600	1,000	1,100	1,200	1,500
Contingency	5,760	4,560	4,720	4,540	6,480
<u>TOTAL</u>	<u>102,360</u>	<u>110,960</u>	<u>124,150</u>	<u>134,070</u>	<u>142,470</u>

The above projections are the core elements for sustainable operation and will obviously increase as the project develops its appeal, its markets and diversifies the available product opportunities.