

BELFAST TITANIC AND MARITIME HERITAGE

- Executive Summary -

prepared for

**Belfast City Council,
Northern Ireland Tourist Board
and Department of Social Development**

by

CHL Consulting Company Ltd.



in association with

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FM Planning



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**Belfast Titanic and
Maritime Heritage Study**
- Executive Summary -

The following is a concise summary of the principal findings, conclusions and recommendations of this strategic review.

1. Assessment of Asset Base

The assessment of the asset base covers 39 sites, products and events (some of which, notably the bus tours and digitally-guided tours) come in a number of variants. A summary schedule is provided in Table 2.1 and detailed descriptions are given in Appendix 2. The key points emerging from the assessment are as follows:

1.1 The Visitor Experience Now

- **The visitor experience is currently limited to a very small number of sites:** a large proportion of the maritime heritage sites are not accessible to the public, and in a number of cases there is little to see at present. However, most of the Titanic-related sites will be accessible by 2012.
- **The Titanic-related sites will be an essential destination for tourists visiting Belfast in 2011, 2012 and beyond:** the sites on Queen's Island are already the most visited maritime heritage sites in Belfast, and together they can become a major destination. The presentation and packaging of these sites in a coherent, easily-accessed way will be very important to the delivery of an excellent experience. This is discussed in Section 6.
- **The operation and operating structure of Thompson Dock and Pump House need to be reconsidered:** The recommendations of the Locum Consulting report should be considered with a view to their implementation.
- **The maritime heritage sites on the Antrim side of the Lagan are older but less obvious:** they need to be given a shared identity, better interpretation and a stronger focal point if they are to deliver an accessible and impactful maritime heritage experience.

- **There is little animation of the water-bodies:** there are two water-based tours and, at present, only one historic ship (the Nomadic) that is committed to Belfast. A second boat, the Confiance, will also offer an exhibition to visitors. HMS Caroline offers a valuable opportunity to add a unique and very important historic ship to the visitor experience.
- **There are few sites outside Belfast city centre that can easily be added to a coherent maritime heritage experience:** the most directly accessible site is the Ulster Folk and Transport Museum, but much of its extensive maritime collection is kept in storage.
- **There is a good supply of tours and trails:** these include boat tours, open-top bus tours, taxi tours, walking tours, and digitally-guided tours.

1.2 Storylines and Interpretation

- **The asset base is extensive, and Titanic is the dominant story:** while it greatly over-shadows the story of Belfast's wider maritime heritage, it is clearly in the interest of promoting tourism to Belfast and Northern Ireland to maximise the Titanic heritage in the period up to and through 2012.
- **There is a certain amount of overlap in the story between the various Titanic-related sites, most notably between UFTM and Titanic Belfast:**
 - Titanic Belfast: the Titanic, shipbuilding in Belfast at that time, Belfast in the early 20th Century including its industrial heritage.
 - SS Nomadic: story of Nomadic, White Star Line, emigration, Hamilton Dock.
 - MV Confiance: shipbuilding in Belfast (primarily 20th Century, post-Titanic).
 - Thompson Dock: Thompson Dock, the Titanic.
 - NMNI Folk & Transport Museum: the Titanic.

In general, the various exhibitions in development appear to be complementary. A certain amount of overlap may be inevitable - even necessary - to tie the exhibitions together and the story of the Titanic exerts a considerable influence.

The largest exhibitions will be those at Titanic Belfast and at the Ulster Folk and Transport Museum. It will be important to present these as being complementary, with the rich immersive exhibition at Titanic Belfast offering a different type of experience to the object-based recounting of the story at UFTM.

- **The story of the wider maritime heritage has yet to be presented in a detailed way:** no single site really presents or interprets the wider maritime heritage story.
- **Adherence to NITB Brand and Interpretation Guidelines is good:** the existing interpretation at Thompson Dock and Pump House, and the exhibitions in development at Titanic Belfast, MV Confiance and SS Nomadic reflect essential elements of the themes and values of the NITB brand for Northern Ireland – i.e. ‘uncovering our stories’ and ‘experiencing our awakening’, with delivery demonstrating, inter alia, authenticity, confidence, pride and creativity.

2. City Development Plans and Infrastructure

Through infrastructural investment in the weir, walkways, landscaping, public art, lighting and public realm spaces, the ‘connectivity’ between the city and the river has been dramatically improved. Spaces, including the river itself, have become the venue for major events.

In light of the review in this study, and with the benefit of an ‘*Infrastructure/Linkages*’ Workshop it is possible to arrive at a number of strategic conclusions:

- (i) Access to the river and the riverfront lands has vastly improved as a result of the significant investment in the Laganside Area, and much of the necessary ‘*hard infrastructure*’ is already in place or will be provided as part of the Titanic Quarter initiative;
- (ii) It is not expected that strategic road improvements (Sydenham by-pass widening and Connsbank Link/junction) will be implemented in the near future (and certainly not before 2012, the opening of Titanic Belfast) due to the planning processes and public and private sector capital spending constraints;
- (iii) Development in Titanic Quarter (Titanic Belfast, PRONI, BMC etc) is proceeding in advance of public transport provision which is essentially in a ‘catch-up situation’; there is no clear programme at present for the delivery of a public transport corridor to serve Titanic Quarter with linkages to the city centre, and the Rapid Transit system will not be in place by 2012.

- (iv) While the maritime area (Laganside covered 500 acres and Titanic Quarter covers 200 acres) is relatively compact and close to the city centre, better signage, landscaping and lighting would help to promote the area as a *'walkable area'*.
- (v) While Belfast's maritime heritage story began on the west of the river and moved to the east, it is the east side of the river, with Titanic Quarter, which is experiencing the bulk of development. There is potential for a link between Clarendon Dock and Abercorn Basin (ferry boat or even a bridge) which would be mutually beneficial.
- (vi) The Lookout Building, owned by DSD, has a strategic location close to Custom House Square, the weir and the footbridge, and its importance will increase as the Obel scheme is completed with a higher quality link to the Clarendon Dock area.
- (vii) Key connections to be improved are the embankment extending from the Lagan Lookout up to Clarendon Dock (which is to be addressed as part of Belfast Harbour Commissioners' City Quays development) and the waterfront area on the east bank between the Queen Elizabeth Bridge and the Odyssey.
- (viii) Improved connectivity between the City Centre and Titanic Quarter is required. The City Council, under their *'Memo of Understanding'* with Titanic Quarter Ltd., wish to see Titanic Quarter not as a separate *'village'* but as an extension of the city centre. The Titanic Quarter *'Access and Transportation'* Theme of the MoU includes 15 actions based around a Titanic Quarter Access Strategy which would have project support and input from a range of agencies. This MOU should be implemented in a way that ensures that the actions align with the opening of Titanic Belfast and contribute to the visitor experience.

3. Maritime Destinations Elsewhere

A maritime destination typically offers visitors the following things in combination:

- A significant amount of tourism infrastructure relating to the maritime heritage areas and stories.
- Public amenities and attractions on and adjacent to the water
- Interpretations of the destination's maritime history and stories of its development in the form of museums and other visitor attractions
- Historic buildings and infrastructure that embody the innovations of their time
- A mixture of facilities and services in waterfront areas to establish a local and visitor community.

The three maritime destinations considered in this report - Glasgow, Liverpool and Bristol - have many similarities with Belfast. All are major trading ports and became significant industrial cities in the 19th and early 20th centuries. All experienced economic difficulties in the 20th century as their manufacturing industries went into decline, and their ports moved out of the city leaving large areas of dockland largely derelict.

Regeneration of the former docklands and industrial areas became a central theme of economic and social development policies from the 1980s on. A broadly consistent strategy has been applied to regeneration. This focuses on mixed use development, combining residential, commercial and new high tech and creative industries. Much attention has been, and continues to be, paid to the quality of the public realm and transport infrastructure.

A key goal has been to attract more people to visit these areas, including both the population of the wider catchment area and tourists. This has been realised through the establishment of cultural facilities and other visitor attractions, using a clustering approach to maximise impact. The major attractors are supported by smaller scale attractors and activities, and street level animation through restaurants, cafés, shops and bars. Festivals and other events are programmed in regenerated dockland areas to increase awareness, enhance market positioning and encourage greater numbers of people to visit. Tourist trails are a feature of the maritime heritage areas.

While this model has been tailored to suit the particular circumstances of each destination, they share certain key features. These are summarised below:

- Broadly speaking, cities are distinguished by their cultural identity, and maritime heritage is at the heart of these cities' identities.
- Economic, social and cultural renewal and development are core goals of the docklands renewal, which has highlighted the three cities' maritime heritage.
- Maritime heritage is a vehicle which contributes to the achievement of these regeneration goals, probably more for its physical aspects (i.e. waterfronts and docks as attractive spaces around which to locate developments) than its intrinsic historic content. Of the three cities, Bristol is the one which has placed greatest emphasis on maritime heritage as an attractor for visitors.
- A variety of built attractors have been developed in each city to draw flows of visitors into the regenerated dockland areas and develop tourism activity – many of these are museums and other cultural institutions that do not necessarily have a specific focus on maritime heritage.
- Events and festivals are important vehicles for the promotion of waterfront areas, and the attraction of crowds of visitors. All three cities have tourist trails linking maritime heritage sites and waterfront attractions.
- Establishing a real sense of place is very important – each of the three cities has highlighted characteristics which immediately strike the visitor with a sense of place. Authenticity is vital, and must be demonstrated in all interpretations of the real heritage. Out-of-context attractors, such as the former Wildwalk rainforest experience at Bristol, risk failure.
- The regeneration of Docklands area tends to have been led by city councils, but special purpose vehicles have been established to ensure effective coordination among key stakeholders (i.e. Bristol Partnership, Clyde Waterfront Partnership in Glasgow and Liverpool Vision).

4. Strategic Framework for Belfast's Titanic and Maritime Heritage

4.1 2020 Vision and Goals

The proposed vision for Belfast's Titanic and Maritime Heritage for the period to 2020 is as follows:

To preserve, enhance and promote Belfast's maritime heritage as the foundation of the city's historic and dynamic character, as a source of pride for its people and as a defining and compelling experience for its visitors.

The strategic goals inherent in the fulfillment of this vision are:

- To develop and promote Belfast as a world-class maritime destination, making effective use of its many maritime heritage assets.
- To ensure that the city's Titanic and maritime assets are fully protected and presented to the highest standards of access, interpretation and welcome to visitors.
- To exploit all practicable opportunities to enhance, innovate and expand the range of products, activities and experiences made available to visitors.
- To draw together the wide range of products into a coherent framework that is comprehensible to visitors while offering multi-dimensional experiences.
- To develop the infrastructure and transport services necessary to facilitate access to all key sites.
- To provide a rich cultural and educational experience for visitors and local residents that will stimulate people of all ages to explore Belfast's maritime heritage and be excited by it.
- To engender a sense of pride in their heritage among all Belfast people.

4.2 Development Priorities

In addressing the issue of development priorities, the strategy must take cognisance of:

- The very substantial commitment of public and private sector funding to projects that are already in development.

- The prevailing economic circumstances which will heavily constrain the availability of additional project funding over the coming two to three years.

With these points in mind, the approach adopted in identifying priorities is to concentrate on lower cost requirements in the short term, with emphasis on ensuring that the existing investments are optimised. Projects with a larger capital requirement are proposed for the medium to long term - a 3 to 10 year horizon.

4.3 Summary

A summary of the recommended measures is provided in Table 1 overleaf. A prioritized action plan for the period to end 2012 is presented in Table 2. Indicative costings are provided.

Table 1: Summary of Recommended Measures (This table is continued overleaf)

A. Short Term Priorities	Measures	Responsibility
<u>Titanic-Related Projects</u>		
Titanic Belfast	- complete by 2012; major pre-opening marketing campaign	HCNI, TFL, BHC, NITB, BCC
Slipways and Plaza	- complete by 2012	HCNI, TQL, BHC
Drawing Offices	- if hotel not in place by 2012, interim dressing and public access	TQL, BHC
Thompson Dock & Pump House	- review management approach and structure	NISP
Alexandra Dock	- incorporate with Thompson Dock & Pump House site for visitor management	BHC, NISP, NITB
Titanic Trail	- complete by 2012 on Boston Freedom Trail model	BCC, NITB, BVCB, BHC
<u>Other Projects in Belfast</u>		
Lagan Lookout	- reopen for 2012 as information hub	DSD
Clarendon Dock	- initiate establishment as destination point; incl. access, interpretation, boats on water etc.	BHC, DSD
SHIP and Sailortown projects	- consider temporary exhibition at Clarendon Dock Pump House	BHC, DSD, SHIP, Sailortown Regeneration
Maritime Heritage Trail	- trail to link sites on Antrim side - integrate with Titanic Trail	BCC, NITB, BVCB, BHC
<u>Water-Based Initiatives</u>		
SS Nomadic	- complete by 2012 - at a minimum restoration and the dockside presentation	Nomadic Trust, TQL, HLF, BHC, NITB
MV Confiance	- complete and align operations with other sites	Lagan Legacy, HLF, NITB
HMS Caroline	- keep in Belfast; draw up phased development plan	Navy, DCAL, BCC, BHC
Boat tours	- consider potential of day trip to Bangor	Lagan Boat Company, BHC
<u>Projects outside City Centre</u>		
NMNI, Cultra	- renewed Titanic exhibition; initiate restoration of Result; continued development of maritime collections	NMNI, DCAL, NITB (exhibition support)
<u>Infrastructure</u>		
Signage	- draw up and implement signage strategy	BCC, TQL, DRD, BHC, NITB
Public transport	- better service to Titanic Quarter	TQL, BCC, Translink

Short Term Priorities...(cont'd)	Measures	Responsibility
Links with Titanic Quarter	- implement BCC-TQL MOU	BCC, TQL
Public Realm	- improve area around key sites, including Titanic Quarter and Corporation Square	BCC, BHC, DSD
Festivals/Events	- implement extensive programme being developed for 2012; plan for follow-on in subsequent years	NITB, BCC
Public Art	- coordinated strategy to be developed with reference to maritime heritage	BCC, DSD
B. Longer Term Opportunities	Measures	Responsibility
<u>Titanic-Related Projects</u>		
Steam cranes	- preserve and restore	TQL, BCC, Lagan Legacy, BIH
Titanic Quarter Regeneration	- develop area around Titanic Belfast Plaza	TQL, BHC
Samson & Goliath	- visitor access	BCC, H&W
<u>Other Maritime Projects</u>		
Story of Belfast/Museum of Belfast	- incorporates maritime history; locate at City Hall	BCC, NMNI
Lagan Lookout	- implement preferred option for redevelopment	DSD
Clarendon Dock	- create Maritime Experience	DSD, BCC, NITB
<u>Water-Based Initiatives</u>		
Water taxi service	- linking key attractions, if feasible	Boat operators, BHC
Additional historic ships	- identify candidates and negotiate with owners	BCC, BHC
On-water attractions	- identify possibilities; advertise for operators	BHC, BCC, NITB
<u>Projects outside City Centre</u>		
NMNI, Cultra	- consider enhanced maritime exhibition new maritime galleries at Cultra	NMNI
<u>Infrastructure</u>		
Titanic Quarter Rapid Transit System	- install link between TQ and city centre	TQL, BHC
Cross-river connection	- link Clarendon Dock and Abercorn Basin by pedestrian bridge	BCC, BHC, DSD
Lagan Navigation	- implement recommended options from 2009 feasibility study	BCC, Waterways Ireland

Table 2: Priority Actions, 2010-2012
(This table is continued overleaf)

	<u>Measures</u>	<u>Indicative Cost Estimate</u>	<u>Responsibility</u>
1. Complete Titanic-Related Projects			
Titanic Belfast	- complete by 2012; major pre-opening marketing campaign	Interim marketing: £250,000	HCNI, TFL, NITB, TIL
Slipways and Plaza	- complete by 2012	Budget in place	HCNI, TQL, BHC
Drawing Offices	- if hotel not in place by 2012, assess possibility of interim dressing and public access	Interim exhibition: £500,000	TQL
Thompson Dock & Pump House	- review management approach	Report on options already done	NISP
Alexandra Dock	- incorporate with Thompson Dock & Pump House site (railings, interpretation)	£125,000	BHC, NISP, NITB
SS Nomadic	- complete by 2012 - at a minimum the dockside presentation	Budget in place/applied for	Nomadic Trust, BHC, TQL, HLF, NITB
MV Confiance	- complete and align operations with other sites	Budget in place	Lagan Legacy, HLF, NITB
2. Establish Connectivity			
Establish Belfast Maritime Brand	- master brand for Belfast's Titanic & Maritime Heritage	£30,000	BCC, NITB, BVCB
Titanic & Maritime Heritage Trail	- complete by 2012; if possible, apply Boston Freedom Trail model of pavement markings	£250,000	BCC, NITB, BHC, BCVB
Review all current printed and digital guides	- ensure consistency in presentation and content	£10,000 (review only)	BCC, NITB, BVCB
Signage	- draw up and implement maritime heritage signage strategy	£150,000	BCC, TQL, BHC, DRD

Note: the cost estimates in this table are indicative only and will be subject to change once detailed design plans have been drawn up and professionally costed.

	<u>Measures</u>	<u>Indicative Cost Estimate</u>	<u>Responsibility</u>
3. Additional Projects			
HMS Caroline	- keep in Belfast; phased development plan; Navy to remove asbestos	Plan for retention: £30,000	Navy, DCAL, BCC
Boat tours	- consider potential of day trip to Bangor	Commercial	Lagan Boat Company
Public transport	- better service to Titanic Quarter	In TQ plans	TQL, BCC, Translink
Links with Titanic Quarter	- implement BCC-TQL MOU	n.a.	BCC, TQL
Linkages between Queen's Island site	- ensure easy physical connectivity between sites by walking tours and transport arrangements	n.a.	Product providers, NITB, BCC, BCVB
Public Realm	- prepare and implement landscaping plans to improve area around key sites, incl. Titanic Quarter and Corporation Square	c. £1,500,000 (excl. TQ)	DSD, BHC, TQ
Clarendon Dock	- initiate as destination point; incl. improved access and interpretation, boats on water etc.	£250,000	BHC, DSD
SHIP and Sailortown projects	- consider temporary exhibition at Clarendon Dock Pump House	£150,000	DSD, SHIP, Sailortown Regen.
Festivals and Events	- implement programme for 2011/2012; plan for follow-on in subsequent years	n.a.	NITB, BCC
Product Packaging	- offer packaged product combinations and multi-site discount ticketing arrangements to visitors	n.a.	Product providers, TFL, BVCB, NITB

Note: the cost estimates in this table are indicative only and will be subject to change once detailed design plans have been drawn up and professionally costed.

5. Packaging and Presentation

The delivery of a compelling visitor experience in 2012, and beyond, will be strongly influenced by the packaging and presentation of the maritime heritage. A number of measures should be considered in this respect:

- **Consistency of presentation:** it is desirable that the key sites, events and collaterals, including printed and digital materials, should adopt a consistent style and content. The current set of materials should be reviewed against this criterion.
- **Coordinated approach to marketing and promotion:** a Titanic Marketing and Communications Stakeholder Group has been established and is chaired by NITB. This Group has an important role to play in achieving effective coordination and avoiding wasteful duplication of efforts.
- **Programme of Events:** There is considerable potential to elevate awareness of and enthusiasm for Belfast's Titanic and maritime heritage through appropriate events. Those in the pipeline need to be promoted to a wider international audience to gain publicity in major target markets.

The potential for Belfast's Titanic and Maritime Heritage to be used as a platform to attract festivals and events should be considered. With the completion of the recommended priority actions by 2012, Belfast will be offering a very high standard of visitor experience as a maritime destination – potentially superior to other destinations considered in this report. This will put the city in a strong position to attract events such as the Tall Ships Race and other tall ship events, the Volvo Ocean Race, and international sail and power boat regattas and championships.

- **Packaging of sites:** the principal admission charging Titanic sites that will be open in 2012 will be Titanic Belfast, Thompson (Titanic's) Dock, MV Confiance and, hopefully, SS Nomadic. There will also be the new Titanic exhibition at the Ulster Folk and Transport Museum, and various tours and events. These sites could be the subject of a promotional initiative combining joint ticketing with joint advertising and collateral.

A full city-card type operation using smart cards is unlikely to be feasible at this stage. Simpler approaches could include one or more of

- A non-smart discount card, issued to visiting tourists; this could be issued free or for a small charge
- 'next site' discount vouchers issued on payment of admission charge at first site visited
- A pre-paid multi-site admission ticket.

6. Management

In summary, the proposed approach is as follows:

- **Strategic Alignment:** it is recommended that Belfast City Council take the initiative through the establishment of the proposed high level Tourism Co-ordinating Group which should include maritime heritage tourism in its brief. This Group would include members from the organisations with the greatest responsibilities in this field, including BCC, DETI, DSD, DCAL, NITB, BVCB, BHC, TQL and TFL. The members of the Group would have the seniority to agree and champion the strategy and ensure that their respective organisations work together to deliver on the plans, objectives and priorities of this strategy.
- **Operational Alignment:** our proposal is, effectively, that operational coordination between the various sites and attractions be undertaken by Titanic Foundation Ltd. whose remit explicitly provides for this. The scope of TFL's role in this respect would be:
 - joint promotion
 - initiating joint ticketing arrangements
 - joint management of the public realm immediately around the maritime heritage assets
 - coordination of opening times and access to public buildings
 - coordination of implementation of other measures, including site interpretation
 - production of maritime heritage guides, trails etc.
- **Site Management:** the various sites, activities and attractions will continue to come under the management of the owners of the site. It will be important that a coordinated approach is adopted to achieve delivery of the best possible visitor experience.

With specific reference to the sites in Titanic Quarter, notably Titanic Belfast, Thompson Dock and Pump House, Nomadic and slipways, consideration could be given to bringing their management together under a single operator. This fully integrated approach would facilitate optimum management of the visitor experience, while achieving efficiencies in administration, marketing, maintenance and other operational aspects. The ownership of the different sites would remain as it is at present, and the operator would work to criteria laid down by the owners and report to them in accordance with a management contract.

Finally, it may be noted that many of the operators of the maritime heritage attractions are small scale and/or charitable trusts. There may be a need to develop their business strengths to serve a growing market from 2012.



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