

Investing in success

Heritage and the UK tourism economy

Heritage tourism has never been more important to our economy.

This report shows its scale and significance across the UK.



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Chair of the Heritage Lottery Fund

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Investing in success



Dame Jenny Abramsky,
Chair of the Heritage Lottery Fund

The UK has been feeling the effects of the toughest economic conditions in decades. Yet, as politicians, economists and business leaders try to get the British economy moving again, it is fair to say that the heritage sector has not been their first port of call.

Even though heritage organisations have been consistently highlighting the benefits our sector brings – providing highly skilled employment and training opportunities, bringing in new visitors and supporting businesses – its important economic contribution has not been sufficiently understood.

Central to our argument has always been the way that heritage gives a big boost to tourism, the UK's fifth-largest industry. And in a good year for tourism, with people choosing 'staycations' over holidays abroad, heritage attractions have helped to increase visitor numbers as a crucial part of our tourism offer. Visits to English Heritage properties were up by 17% during summer 2009, and annual visitor numbers at National Trust sites rose by almost a fifth in the same year.

Part of the reason why the economic impact of the heritage sector has been underestimated is that we simply haven't had the data to make our case. This report is the first to provide those missing numbers, and demonstrates that the heritage-based tourism economy is bigger than other studies have previously suggested.

Building on work carried out for VisitBritain, our research shows that the size of the heritage-tourism sector is in excess of £12.4 billion a year and supports an estimated 195,000 full-time jobs – this makes the sector bigger than the advertising, car or film industries.

It is important to recognise that this contribution comes from an incredibly broad range of attractions. Heritage tourism is not simply about visits to the UK's historic buildings and monuments – as important as they are. It is also not just about our excellent museums and galleries, or even our rich industrial, maritime and transport heritage. Our stunning landscapes, parks and wildlife sites are also immensely popular with tourists from home and abroad. Some 1.2 billion visits are made to the UK's countryside every year.

Heritage attractions are spread right across the UK. This is not an industry solely reliant or focused on London and the great metropolitan cities. As the case studies in this report show, heritage attractions in places as diverse as Glasgow, Worcestershire, County Durham, the Sussex coast and Blaenavon are bringing in new visitors and boosting local economies.

The National Lottery has played its part in helping these heritage attractions to thrive. Since the Heritage Lottery Fund (HLF) was created in 1994, £4.4 billion of Lottery money has been invested in the UK's heritage. This includes funding for eight of England's top 10 most popular attractions, 21 of the UK's 25 World Heritage Sites, and 14 National Parks, as well as support for heritage attractions in some of the most deprived local authorities. With the tourism economy estimated to grow even more over the next 10 years, investing in our heritage makes sense now more than ever. This is an important challenge for the heritage sector and for local and national politicians.

The heritage sector has taken huge steps in the past few decades to open up the notion of what heritage actually is and make it relevant to everyone. So it is crucial that the visitor experience and the opportunities for all kinds of public involvement at heritage sites continue to improve and increase.

“With the tourism economy estimated to grow even more over the next 10 years, investing in our heritage makes sense now more than ever.”

However, this will not be enough unless politicians and policy-makers recognise the importance that heritage has, not only for local communities but for the economic health of the UK as well.

As Regional Development Agencies revise their capital programmes, local authorities begin the process of making

their budgets work, and all public bodies seek savings, public-sector investment in heritage attractions may be threatened. A recent survey of councillors showed that museums and galleries, tourism and leisure were seen as the areas most ripe for cuts¹.

I believe that this would be very short-sighted. As this document demonstrates, heritage is not a luxury or a pleasant recreational pastime, but an integral part of our future. Heritage – and particularly heritage-based tourism – has never been more important to the UK's economy. We need to say so.

Valuing heritage tourism



Sandie Dawe MBE,
Chief Executive of VisitBritain

Since the 17th century and the advent of the Grand Tour, culture has been a motivating factor for travel and tourism. Today, heritage and culture are the primary motivators that overseas visitors of all ages and nationalities cite as their reason to visit the UK.

VisitBritain's research in 35 countries around the world reveals that our core strengths as a visitor destination are our heritage, history, pageantry and culture. Crucially, however, it is our living heritage that most inspires our visitors; the past brought to life, interpreted and explained. People tell us that they especially value our accessible heritage – our museums and galleries, castles and stately homes, our ruins and industrial sites, our palaces and cathedrals – because it is not presented 'in aspic' but includes living, breathing, vibrant places that belong as much in the present as in the past.

“ Our heritage economy is vibrant, and a crucially important part not just of the £114billion visitor economy, but of our local, regional and national economies as well. ”

Britain is hugely fortunate to have a wealth of heritage attractions in such a small geographical space, but it is exactly because we are a small island that our cultural and heritage offering is so rich. Britain is like a palimpsest, a parchment upon which generations have made their mark, scratched their own identity, and then, with the passage of time, these scars have been erased or part lost, allowing a new generation to make their mark afresh. This has ensured that the past is never fully lost, progress and modernity never rejected, and the temptation to over-glorify our heritage has not become stifling or overbearing. Our heritage economy is vibrant, and, as this report fully demonstrates, a crucially important part not just of the £114billion visitor economy – the UK's fifth-biggest industry – but of our local, regional and national economies as well.

Britain also enjoys an enviable reputation around the world for the care that we take and the conservation expertise that we employ to ensure future generations of domestic and overseas visitors can learn from our past. The National Trust, English Heritage, Cadw, the

“ Our heritage attractions are the very product of travel and tourism; built according to international influences, filled with souvenirs and artefacts, suffused with stories of characters all drawn from international travel. ”

National Trust for Scotland, Historic Scotland and hundreds of smaller charities and trusts have harnessed the enthusiasm, time, effort and money of individuals and the public and private sectors to pass on our heritage inheritance in better shape than they found it. VisitBritain has created a Culture and Heritage Club – a virtual community of those who work with us to grow their overseas-visitor base. Through

the club they benefit from our market intelligence, trends analysis and opportunities to participate in our consumer campaigns around the world. Two recent examples are highlighting the breadth and geographical presence of our free national museums as part of our value campaign: ‘Britain for less’, aimed at demonstrating to the overseas visitor that you can experience Britain on a budget; and our Great British Heritage Pass, one of our most popular products, which can be bought from our online shops prior to arriving in Britain and gives access to over 600 attractions, from Stonehenge to Edinburgh Castle.

It is fitting and appropriate that visitors, domestic and overseas, value Britain’s heritage to the extent they do. Our heritage attractions are the very product of travel and tourism; built according to international influences, filled with souvenirs and artefacts, suffused with stories of characters all drawn from international travel, whether for trade, war, cultural or religious pilgrimage, leisure or marriage. Our visitors are fascinated to see how travel has influenced the British and how in turn we have reflected the world in our homes and places of power and faith. And yet our heritage remains defiantly, recognisably British; conserved, maintained and interpreted for a new generation to understand who we are and in so doing contribute to our economic and cultural wellbeing today.

Heritage and the UK tourism economy



Research findings

In 2009 HLF commissioned economic-forecasting consultancy Oxford Economics to undertake a detailed analysis of the heritage-based UK tourism sector. The analysis looked at the extent to which tourism visits and expenditure – both from overseas and by domestic visitors – are motivated by heritage. From this analysis the researchers were then able to estimate the contribution that heritage tourism makes to the UK's economic output, and the employment impact of heritage.

Heritage is the mainstay of the UK tourism economy. The breadth, beauty and cultural importance of our heritage are the most important factors behind the 10 million holiday trips made by overseas visitors to the UK each year². Four in 10 leisure visitors cite heritage as the primary motivation for their trip to the UK – more than any other single factor.

The popularity of heritage is well understood, and we have long had the numbers that confirm this. Some 53% of the population make a trip to experience the atmosphere of a historic town or city at least once a year, and 42% visit a museum or gallery³. The total number of visits to museums and galleries has been estimated at over 40 million a year⁴, whilst 1.2 billion visits are made to the countryside⁵. Over 10 million visits are made to historic parks⁶, more than 38 million to historic houses, cathedrals and castles⁷, and more than 250 million to Britain's inland canals and waterways⁸. Historic houses in private ownership play a crucial part in supporting this essential national resource, welcoming 14 million visitors each year⁹.

2009 was a good year for the heritage sector, with visits to English Heritage properties during the summer up by 17% on the year before, and many National Trust properties ending the year with visitor numbers up by almost a fifth. Gains were also enjoyed at properties managed by the National Trust for Scotland and Welsh heritage body Cadw.

The size of the heritage-tourism industry

Although these basic visit data have been available for some time, one statistic conspicuously missing has been an estimate of the overall scale of the economic activity that is generated by people visiting heritage sites. This figure has now been produced, as a result of the recent research commissioned by HLF and carried out by Oxford Economics, *Economic impact of the UK heritage tourism economy*.

The research shows that the heritage-based tourism economy is bigger than any previous analyses have indicated. The research took a broad view of heritage – encompassing historic buildings and monuments; historic towns; museums and galleries (other than contemporary-art galleries); historic landscapes; historic parks; and features of industrial and transport heritage such as canals, ships and trains. Figures were calculated for the whole of the UK.



1



2



3



4

- 1 A performance at the restored Buxton Opera House
- 2 The Anderton Boat Lift in Cheshire was restored, reconnecting the River Weaver and the Trent and Mersey Canal for the benefit of hundreds of boaters
- 3 The bustling St George's Market in Belfast, restored with HLF help
- 4 Young people in north Yorkshire exploring the Howardian Hills Area of Outstanding Natural Beauty

The research concluded that the size of the heritage-tourism sector, by expenditure, is in excess of £12.4billion a year. This scale of activity supports an estimated 195,000 full-time-equivalent (FTE) jobs (Fig 1).

- £7.3billion of heritage expenditure is based on built heritage and the museums sector; the bigger, £12.4billion figure includes natural heritage, and incorporates visits to parks and the wider countryside.
- The relative importance of domestic tourism is clear in the figures – £7.5billion worth of expenditure, or 60% of the total, is spending by UK residents making day trips and taking holidays in the UK.

This means that heritage tourism makes a contribution to the total output of the UK economy – as measured by gross domestic product (GDP) – of £7.4billion per year. This is a bigger contribution than that of many other, more visible sectors of the economy, including advertising, film, and even the car industry (Fig 2).

Once economic ‘multiplier’ effects are included, the numbers increase to a GDP contribution of £20.6billion a year, supporting a total of 466,000 jobs.

Potential for growth

Although these figures are extremely useful in proving the overall economic significance of heritage, a more important message – at a time when ways are sought to reconstruct our economy on a sure, long-term footing – is the potential for growth in the sector. The encouraging 2009 visit data indicate what can be achieved if more UK residents decide to take UK holidays and short breaks.

In work carried out for VisitBritain, Deloitte Consulting and Oxford Economics have estimated that the tourism economy will grow by 2.6% a year between 2009 and 2018 – much higher than the 0.8% forecast for manufacturing, and similar to the growth rate of the retailing and construction sectors¹⁰. In employment terms, these growth figures are even more significant, since the labour intensity of the tourism sector means that more jobs are created per percent of sector growth than in other industries. Furthermore, according to Deloitte Consulting, growth would be higher if the staycation effect can be maintained.

The heritage sector is well aware of these opportunities – but also of the challenges that exist. Of growing importance is environmental sustainability, which will have a major impact in the future through key issues of climate change and transport policy. Domestic tourists are important again here: the greater the number of quality destinations and attractions that exist, the less necessary it will be for people to travel long distances every time they want a special day out. There is enough heritage on everyone’s doorstep to make this a realistic goal.

Fig 1: The heritage-based visitor economy¹¹

| Expenditure (per year) by type of visit | Excluding natural heritage | Including natural heritage |
|--|-------------------------------|-------------------------------|
| International tourism | £2.6bn | £4.9bn |
| Domestic overnight stays | £0.5bn | £1.1bn |
| Domestic day trips | £4.2bn | £6.4bn |
| Total expenditure | £7.3bn | £12.4bn |
| GDP contribution (per year) | | |
| Total 'direct' GDP contribution | £4.3bn | £7.4bn |
| GDP contribution incl. multiplier impacts | £11.9bn | £20.6bn |
| Employment | | |
| Employment (jobs) | 113,000 | 195,000 |
| Employment (jobs) incl. multiplier impacts | 270,000 | 466,000 |

Fig 2: Examples of sector contributions to UK GDP¹²

| Industry | GDP contribution (per year) |
|---------------------------------|--------------------------------|
| Publishing | £10.0bn |
| Agriculture | £9.6bn |
| Heritage visitor economy | £7.4bn |
| Electricity generation | £6.5bn |
| Advertising | £5.8bn |
| Motor-vehicle manufacturing | £5.5bn |
| Film | £3.3bn |

How the research was done

The Oxford Economics research commissioned by HLF uses a top-down modelling approach to make the best use of the available data. The work has built on a method for estimating economic impact that was developed by Deloitte Consulting and Oxford Economics in their earlier work for VisitBritain. The steps in the analysis are:

1

Estimates of overall visit numbers under various categories are collated from Office for National Statistics (ONS) and VisitBritain sources. These categories cover international holiday trips and 'visits to friends and relatives', as well as domestic overnight and day-trip visits.

2*

A heritage 'allocator' is assigned to these categories of visit, based on the main 'motivations' that we can estimate underpin each one.

3

Once these allocators have been applied, further survey data on expenditure for each category is used to obtain a total expenditure amount for the heritage-based visitor economy.

4

Results from other tourism research are used to convert expenditure amounts into estimates of GDP contribution and the number of jobs supported by heritage-based tourism.

* This is a crucial part of the analysis. The reason people make tourism visits, whether as part of a two-week holiday or a Sunday day out, is the result of a complex interaction of personal and social factors. We cannot say that *all* of the expenditure made during visits to heritage attractions – both on site and off site – is made because of heritage. Other factors will certainly be important in motivating the overall trip – such as wanting to visit a new restaurant, stay in a favourite hotel, or simply the desire to be with friends and family. But we can use surveys of holiday-makers and day-trippers to gain a good insight into the relative importance of different motivations – and hence the proportion of total expenditure that it is reasonable to ascribe to heritage. Several different sources of survey evidence were used in the analysis, including work carried out for VisitBritain, Natural England and ONS.

In the case of overseas visitors, the proportion of expenditure we can ascribe to heritage is very high – heritage is a main motivation for 30% of all international visits. The remainder is mostly made up of business trips and people for whom the most important reason for coming to the UK is to visit friends and family (Fig 3).

The allocators for domestic day trips are lower – around 14% of these trips are estimated to be 'motivated' by heritage: 9% by heritage visitor attractions and 5% by the countryside. The proportion ascribed to heritage is lower because this category of visits includes a very wide range of activities – such as shopping expeditions (for all but the basic weekly groceries); nights out with friends at a bar or a pub; restaurant meals and trips to the cinema (Fig 4).

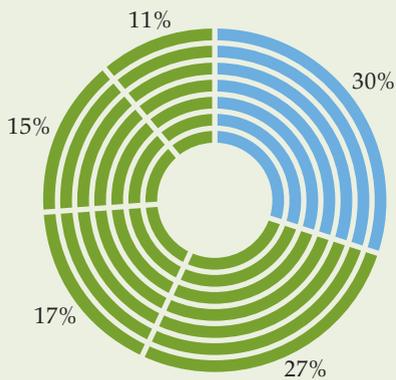


Fig 3: Main motivations for international trips¹³

| | |
|---|------------|
| Heritage | 30% |
| Business | 27% |
| Visiting friends and family | 17% |
| Non-heritage holiday motivations (incl. contemporary arts and culture, sport, shopping) | 15% |
| Other | 11% |

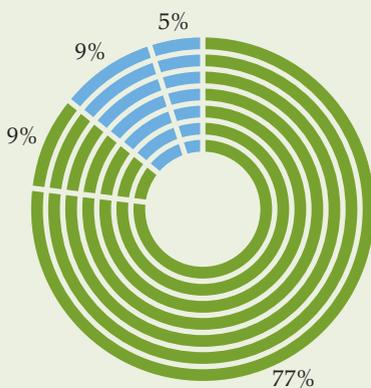
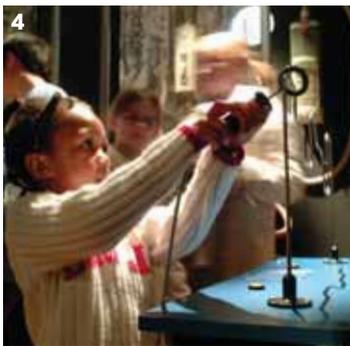


Fig 4: Main motivations for domestic-tourism day trips¹⁴

| | |
|---|------------|
| Other (incl. shopping trip, cinema, meal out, night out at bar or pub) | 77% |
| Trip to visitor attraction – non-heritage | 9% |
| Trip to visitor attraction – heritage | 9% |
| Visit to park/countryside – natural heritage | 5% |

Heritage and the UK tourism economy

- 1 Ice-skating at Somerset House, London
- 2 Pond-dipping at the conserved Rye Meads Nature Reserve in Hertfordshire
- 3 The restored Turkish Baths in Harrogate
- 4 A young visitor explores the Luton Life exhibition at Luton Museum
- 5 A hands-on display at Sheffield's Weston Park Museum



Heritage tourism and the post-recession economy



Simon Thurley,
Chief Executive of English Heritage

English Heritage's 400-plus properties offer visitors a diverse range of experiences, from visiting stately homes to exploring ruins. Our sites are found across England, with many situated in some of the more deprived areas of the country. In total, approximately 900 people are directly employed by English Heritage to run, maintain and promote these sites, with many more businesses supplying goods and services.

HLF's current report successfully demonstrates the importance of heritage tourism to the UK economy. On the basis of promising visitor figures for 2009 and well-targeted investment into heritage sites, we believe that heritage tourism can become an increasingly important sector of the UK economy as we come out of recession and move towards recovery.

“ We believe that heritage tourism can become an increasingly important sector of the UK economy as we come out of recession and move towards recovery. ”

In line with much of the sector, 2009 was a bumper year for English Heritage properties. In the 12 months up to September 2009, there were 5.5 million paying visitors to our staffed sites – the highest visitor numbers since 2000, up by 17% on the 12 months to September 2008. A key driver behind this growth is the staycation trend. Visitors from the UK

have always been an important market for English Heritage properties, but in 2009 the proportion of UK visitors at our top 10 sites was amongst the highest ever – 84% of all visitors. We have also seen a rise in the number of international tourists visiting attractions such as Stonehenge, with people attracted in part by the weak pound.

English Heritage is continuing to look at new ways to increase visitor numbers, diversify the visitor base and improve the visitor experience. Down House – the Kent home of Charles Darwin – and Kenilworth Castle are dramatic illustrations of the impact that well-targeted investment can have at heritage sites. In the 12 months up to September 2009, visitor numbers at Down House were up by 177% on the previous 12 months, and at Kenilworth Castle – by 53%. The substantial number of extra visitors will have had a significant impact on local economies,

and in 2010 English Heritage will be commissioning work to explore this in more detail. With investments planned across the English Heritage portfolio, including at Audley End in Essex and the future Stonehenge Visitor Centre, we are confident that visitor numbers at these sites will continue to increase over the next few years.

“ The substantial number of extra visitors (to Down House and Kenilworth Castle) will have had a significant impact on local economies. ”

Heritage Open Days, managed by English Heritage since 2009, are another mechanism through which the sector is looking to get more people involved in heritage. In 2009, 4,100 events took place across the country, attracting one million people. Fifteen years after their inception,

the open days are still drawing in new visitors to heritage sites, with four in 10 people participating for the first time and a third not having visited a heritage site in the previous 12 months.

In times of economic difficulty, heritage tourism has proven its enduring popularity. As we come out of recession, we must continue to build on this positive position.

Cultural organisations and the visitor economy



Roy Clare CBE, Chief Executive of the Museums, Libraries and Archives Council

Museums, flagship libraries and archives play a central role in supporting the visitor economy. These historic and civic buildings, their collections, and the valuable services they offer are not only fundamental to the lives of local people but are a key part of the tourism industry.

According to the Association of Leading Visitor Attractions, the 10 most visited attractions in the UK in 2008 were all cultural – proof alone that museums and galleries have a significant role in attracting visitors.

Special exhibitions and cultural events such as the 2012 Olympics festival's Stories of the World, or the draw of the European Capital of Culture title, can often prove to be the most significant reason for a visit. Bristol Museum's Banksy exhibition alone generated 50,000 bed-space bookings in hotels and B&Bs, a significant contribution to the visitor economy.

“ Museums, flagship libraries and archives play a central role in supporting the visitor economy. ”

The Museums, Libraries and Archives Council (MLA) has been at the forefront of the promotion of culture in communities, particularly through the Living Places programme. This partnership aims to ensure that culture, the arts and sport are embedded in everything a local authority does, and place-shaping invariably has a knock-on effect for tourism and the wellbeing of the community as a whole.

For example, the National Fairground Archive, based at the University of Sheffield library, has been instrumental in an ongoing scheme to promote tourism in Blackpool, helping to arrange a series of imaginative events celebrating the town's entertainment history. The scheme proved very successful, with a good uptake from residents and visitors alike.

MLA's Leading Museums action plan highlights how museums across England already have a key role alongside other cultural organisations in enhancing tourism, but more needs to be done to exploit the opportunities.

All museums, including those in local-authority ownership, need encouragement and support to make stronger contributions to tourism economies, with greater freedom to develop commercial partnerships and explore initiatives that link culture, heritage and tourism.

“ All museums, including those in local-authority ownership, need support to make stronger contributions to tourism economies. ”

At a time when the economy is looking for a boost, museums and other cultural services not only have the potential to bring positive social outcomes; they are excellent value for money, and they can shape great places to live and visit.

The MLA is working closely with tourism boards, cultural agencies and local-authority partners to ensure museums are included in the development of tourism policy.

The message for local authorities is that culture is not a cost but an opportunity.

HLF's investment in the UK tourism economy



Research findings

HLF has invested £4.4billion in the UK's heritage since 1994. Over the past five years we have carried out extensive research into the impacts of completed projects – including through a series of visitor surveys and economic-impact case studies.

This research has given us a good indication of the difference that our funding has made – to visit numbers, to the experience of visiting heritage, for local residents and for tourism businesses.

- Visit numbers typically rise by more than 50% following an HLF-funded project¹⁵.
- The scale of visit satisfaction is extremely high. Surveys at 60 completed projects, of more than 5,600 visitors, have established that an average of 97% of people class their visit as 'enjoyable', with 77% describing it as 'very enjoyable'¹⁶. This indicates that HLF funding typically raises visitor satisfaction to levels that are more than a fifth higher than the average for the tourism sector as a whole. By raising the bar in this way, HLF investment can help lift the standards of visitor experience across the sector.
- Visitors strongly approve of HLF investments. We asked visitors to judge for themselves whether the HLF funding was a good use of Lottery money. Knowing the cost of the project, 55% rate the value for money of projects as 'excellent', and a further 33% describe it as 'good'¹⁷.

In separate surveys with local residents¹⁸, we also checked the response of the people who live nearby to HLF-funded projects. Interviews with 4,900 residents living near to 45 completed projects have shown that awareness of HLF funding is very high – 75% know about the HLF-funded projects in their area. And HLF funding does increase local involvement, with nearly a fifth of local people saying they visit their local attractions more often now. Sixty percent say the local heritage supported by HLF is 'important in making my part of the UK special'.

Economic impacts of HLF projects

Our research over the past five years has also looked at the scale of the economic impacts associated with completed projects, by reviewing a random sample of 62 projects that completed between 2004 and 2007 (Fig 6).

The first important finding from this research was that spending by visitors within local economies is much higher than their spending



Fig 5: HLF funding for the top 10¹⁹ most popular visitor attractions in England

| Attraction | HLF funding ²⁰ |
|------------------------------------|---------------------------|
| 1 British Museum | £20.2m |
| 2 Tate Modern | £1.8m* |
| 3 National Gallery | £34.4m |
| 4 Natural History Museum | £26.7m |
| 5 Science Museum | £23.5m |
| 6 Sheffield Winter Garden | — |
| 7 Victoria and Albert Museum | £29.4m |
| 8 Grand Pier, Weston-super-Mare | — |
| 9 National Portrait Gallery | £13.4m |
| 10 Tate Britain | £30.0m |

*For acquisitions



- 1 The Great Court of the British Museum, London, where HLF helped to create an education and information centre
- 2 Visitors at the specimen wall in Cocoon, part of the Natural History Museum's Darwin Centre, London
- 3 Children take part in a workshop at the National Portrait Gallery, London

3

2

at the heritage destination itself. Of every £1 spent as part of a heritage visit, only 32p is spent on site. The remaining 68p is spent away from the attraction itself – but as a direct result of visiting heritage – in restaurants, cafés, hotels and shops, for example. This 'heritage motivator' is what produces the substantial economic-impact results that we find through the research.

Overall, the total amount of money spent within the local economy, by all visitors to the funded heritage attractions in the research, was found to more than double following the completion of an HLF project. Consequently, the number of new jobs created was an average of 53 per project.

These figures are higher if we look at the total number of jobs *supported* by HLF funding – that is, the number of new jobs created plus those that previously existed but are now much more secure as a result of HLF investment. The research established that the 62 case-study projects had supported over 6,000 jobs. HLF has invested a total of more than £1.8 billion in projects that have now completed, and so, on the basis of the research findings, we estimate these projects have sustained over 32,000 jobs in the tourism sector.

“ Every £1 million of HLF funding leads to an increase in tourism revenues for regional economies of £4.2 million over 10 years. ”

Another way to look at this is to consider the 'return' on HLF investment – how much extra money is spent in the regional economy. Assuming that visit numbers can be maintained, and employing a discount rate of 3.5%, the research shows that every £1 million of HLF funding leads

to an increase in tourism revenues for regional economies of £4.2 million over 10 years. This means that, two years after completion, attractions have brought extra revenue into the regional economy equivalent to their HLF grant.

Additionality in the local and regional area

Of course, in all cases, HLF provided only part of the initial investment required, and retaining these economic benefits year after year depends on ongoing operational expenditure, management expertise and marketing. Nevertheless, the figures give a clear indication of the economic impact created by HLF investment, and more details about specific HLF-funded sites are provided in the 'Case studies' section of this document.

The analysis doesn't mean that the extra amount of visitor spend linked to HLF projects is greatly 'additional' at the level of the *national* economy. Domestic consumers would have chosen to spend this amount somewhere, on something, irrespective of the HLF projects,

“Two years after completion, attractions have brought extra revenue into the regional economy equivalent to their HLF grant.”

and only the extra spending by international visitors can be counted as boosting the UK economy. But at local and regional levels the impacts certainly have been additional, with the investment helping places to diversify and develop more resilient economies – especially

those 27 projects in the research that are located in the most deprived parts of the UK. This is an important feature of the tourism sector: its impact tends to be more significant in areas with a greater need of economic revitalisation.

The research also helps us to understand more about an important rationale for continued public investment in the tourist economy – a rationale identified by Deloitte Consulting in their VisitBritain work. This is the ‘free rider’ issue: as the research clearly shows, attractions only capture a relatively small proportion of the total economic benefits associated with upgrades and improvements. For all the other local businesses that gain from the investment – the hotels, restaurants and cafés whose earnings rise – these benefits are obtained without contributing to the investment. Attractions, thinking about their own income only, will under-invest when compared to what would be best for the local economy as a whole. Public investment – including Lottery investment – needs to take into account these wider economic impacts.

Fig 6: Economic impacts of HLF funding for visitor attractions^{21/22}

| | |
|---|-------|
| Number of projects in research | 62 |
| Total HLF funding | £310m |
| Impacts of HLF-funded projects within the regional economy | |
| Additional spend (per year) | £151m |
| Total number of jobs created | 3,295 |
| Total number of jobs supported | 6,293 |



How the research was done

HLF's economic-impact research was carried out between 2005 and 2008 by two external consultant companies, Ecotec and GHK. Projects included in the research were selected on a random basis from amongst all those completing between 2004 and 2007.

The research focused on:

- the impacts associated with capital works funded by HLF (through direct employment and revenues for contractors and suppliers);
- the impacts of ongoing operations (through on-site employment and expenditures);
- visitor-related benefits; and
- wider regeneration/property-market impacts.

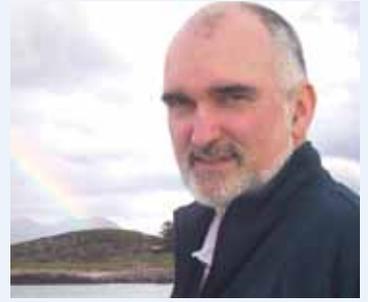
Eighty projects were assessed in total, all of which had received grants of at least £250,000 from HLF; 62 of these were projects at visitor destinations. These included museums, historic buildings, parks and nature reserves.

To assess the economic impacts of visitor spend, data on visit numbers were combined with trip details, including information about where visitors were staying overnight during their visit, where they had travelled from, how many people were in their group, how much money they had spent, and where they had spent it. In most cases this meant undertaking new, original survey work amongst visitors.

Survey questions also sought to establish the main motivations behind visit decisions. This information was crucial to the analysis of additionality, especially the consideration of 'deadweight' and 'displacement'. Through this analysis, the research takes account of the extent to which expenditure within a local/regional area can be considered genuinely 'extra', and would not have taken place if the HLF-funded project had not happened. Survey questions establish whether it is likely visitors would have spent money in the local area irrespective of the project taking place (deadweight), and whether the project resulted in shifts in expenditure within the area (displacement).

This thorough treatment of additionality meant the geographic scale of benefits was carefully considered, with impacts assessed at two spatial levels – the local economy (all businesses based within a 10-mile radius of the project location) and the regional economy (all businesses within 50 miles).

The role of natural heritage in driving tourism



Ian Jardine, Chief Executive
of Scottish Natural Heritage

Tourism is one of the largest industries in Scotland, employing over 200,000 people and generating approximately £4billion annually. Scotland's natural heritage is a significant part of the tourism industry.

The country's stunning landscapes and wildlife attract tourists from near and far, and are consistently cited as the most important factor in drawing visitors to Scotland²³. In a survey carried out by VisitScotland,

“The country's stunning landscapes and wildlife attract tourists from near and far, and are consistently cited as the most important factor in drawing visitors to Scotland.”

people from across the UK voted dolphin-watching in the Moray Firth as their top activity for spending a 'perfect day' in Scotland.

Nature and landscapes provide the backdrop where visitors can enjoy a range of outdoor activities such as walking, cycling and wildlife-watching. Scotland is home to a diverse range of wildlife,

including some of the largest and most important seabird colonies in Europe. The country has three-quarters of the UK population of red squirrels, and is the best place in the UK for viewing iconic species such as the golden eagle, puffin, bottlenose dolphin and red deer.

There is no single report that quantifies the economic benefits of nature-based tourism, although various different studies give an indication of the importance of the sector. For example:

- whale-watching in Scotland is estimated to bring in £10.7million a year;
- anglers spend an estimated £113million a year on fishing in Scotland's famous rivers including the Spey, Dee, Tay and Tweed;
- wild geese attract birdwatchers, wildfowlers and tourists, who contribute £3.5million a year;
- sea eagles bring £1.69million a year to the Mull economy;
- ospreys have become a popular tourist attraction, bringing in 125,000 visitors who spend an additional £2.2million every year;

- watching seabirds at the Scottish Seabird Centre, North Berwick, brings over £1million a year into the local economy;
- wild deer are a great attraction for tourists, with deer-management generating £105million a year;
- outdoor activities such as walking and cycling are growing in popularity. Over 330 million visits were made to Scotland's outdoors for recreation purposes in 2007. Almost a quarter of all tourists walk as their main activity or as part of a trip.

As advisor to the Scottish Government on nature and landscapes, Scottish Natural Heritage (SNH) plays an important role in supporting the tourism industry – we directly provide tourism services through our network of 55 National Nature Reserves, which receive around 750,000 visits each year. Together with Scotland's two National Parks, 40 National Scenic Areas and two Geoparks, the Nature Reserves make up a central element of Scotland's attraction. By late spring 2010, we

will be publishing the findings of a new study to evaluate the economic impact of tourism activities directly depending on the natural heritage.

Of course, more could always be done to promote Scotland's nature and landscape to visitors and to people who live in Scotland. SNH is currently developing a

“ Nature and landscapes provide the backdrop where visitors can enjoy a range of outdoor activities such as walking, cycling and wildlife-watching. ”

major communications campaign, for launch in spring 2010, aimed at encouraging people to get outside and enjoy what Scotland's outdoors has to offer, and inspiring enjoyment of the nature on our doorsteps and further afield. Central to this campaign will be a high-profile advertising drive. We have made a start on this by producing new promotional leaflets to guide visitors through the history, landscape and wildlife of an area. The new leaflets recommend itineraries for visitors to take in the best historic landscapes, with battlefields, forts and castles, as well as suggesting the best places to experience magnificent mountain, loch and woodland scenery. We are also working with the industry to develop a strategic context for rural heritage and get a better understanding of the existing and emerging heritage-tourism markets for Scotland.

Enhancing the visitor experience through heritage



Stephen Johnson,
Chair of the Broads Authority

The Broads, part of the UK's family of National Parks, is one of the most important freshwater wetlands in Europe. Over 25% of the 300km² area of this nationally protected landscape in Norfolk and Suffolk has a European designation for its nature-conservation interest. The Broads' value to residents and visitors is well researched and established. In 2008, the wetland attracted around 11 million visits, which generated a total spend in the area of £413million.

The scenery of the Broads is one of its main attractions, linked to the tranquillity and the slow pace of travel within the waterways; surveys in recent years have shown that watching wildlife is therefore one of the major activities enjoyed by visitors who take advantage of the 300km of footpaths and the 190km of navigable waterways. The quality of the water, and of the habitats it supports for wildlife including otters, bitterns and swallowtail butterflies, is highly prized.

“The Broads' value to residents and visitors is well researched and established. In 2008, the wetland attracted around 11 million visits, which generated a total spend in the area of £413million.**”**

But this green space also contains many layers of heritage: indeed, the 'Broads' themselves are shallow pits originally dug in the ninth to 13th centuries next to the river channels for the intensive exploitation of peat. They are therefore opencast industrial workings, and their flooding, coupled with nature's ability to reclaim such sites, has led to the tranquil landscape we see today. There have also been periods since 1300 when

the area has been exploited for trade, agriculture, drainage, hunting and fishing, and there is a long history of recreational use of the water. Like many other green spaces, the Broads landscape is a living and working example of the historic environment.

In recent years, many steps have been taken to reinforce the landscape character of the area, and to improve both its natural assets and the visitors' experience. Action is now in place to enhance biodiversity, to eradicate or control invasive species, and to restore Broads that are in danger of silting up. A survey has been completed of all listed and

scheduled heritage assets to identify those most at risk, and work on the analysis of the area's landscape types to assist in decisions on planning is underway. With help from HLF's Training Bursary Scheme, which supports training in disappearing skills such as reed-management and millwrighting, the Broads Authority aims to

“ The scenery of the Broads is one of its main attractions, linked to the tranquillity and the slow pace of travel within the waterways. ”

secure the future of those trades within the landscape that has been moulded by them in the past.

In practical terms, the task of helping all our visitors to appreciate the many facets of the landscape around them remains one of our key aims, and there are also

positive steps being taken to improve the supporting infrastructure through the encouragement of sustainable-tourism initiatives, the awarding of quality charters, and the co-ordinated promotion of visitor facilities. Visitors to the Broads, therefore, come to an area where the mixture of heritage and green space is so complex and intertwined that the distinction between the two is impossible to draw.

Case studies

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Railway Museum at Shildon



Croome Park

HLF grant
£4,917,042

Completion date
August 2006

Croome Park is the landscape park in Worcestershire where Lancelot 'Capability' Brown earned his early reputation. Remodelling the park and gardens surrounding Croome Court was, in 1751, the designer's first major commission. The park is now owned by the National Trust, and has been extensively restored with HLF support, but at one stage it was under threat of being converted into a golf course.

The restored park employs more than 20 people in a combination of part-time, full-time, permanent and seasonal roles. The day-to-day running of the park has brought many benefits to nearby businesses including a local garage, a plant nursery and a carpenter's workshop based at Croome Court.

60,000 people now visit every year – up from just 4,500 in 1999. Around two-thirds of visitors come on a day trip from home, with the rest staying in the area for longer. The park is a major motivation for tourism – 59% of park visitors staying in the local area made their trip especially to visit Croome Park.

Its economic impact was minimal prior to the restoration project, but the park now brings hundreds of thousands of pounds of additional visitor expenditure into the local economy every year. The economic gross value added (GVA) – a measure of the new income received by business owners and employees – is estimated at £362,000 per year within the local economy and £427,000 in the wider regional economy.

There is great potential to further develop the regeneration role of the site. The National Trust has now acquired Croome Court, which lies within the park and has one of the largest walled gardens in the country. This could double the number of visitors to 120,000 a year, since it would increase the year-round appeal of the destination. The National Trust is also in discussion with transport charity Sustrans about developing a cycle route from Croome to the wider region.

Economic impacts summary

| | Employment (FTE) | | GVA (£'000) | |
|--|------------------|-----------|-------------|------------|
| | Local | Regional | Local | Regional |
| Staffing | 11 | 11 | 87 | 87 |
| Suppliers, visitor expenditures and multiplier impacts | 11 | 16 | 275 | 340 |
| Total | 22 | 27 | 362 | 427 |



Local jobs created



Kelvingrove Art Gallery and Museum

HLF grant
£13,171,500

Completion date
June 2006

The Kelvingrove Art Gallery and Museum opened in 1901 in an imposing Gothic building that Glaswegians once voted their favourite in the city. It houses collections of art, natural history and historical artefacts, and is the most visited museum in the UK outside London.

More than one million people were visiting the museum each year before it closed for restoration in 2003. By this time, however, the building was in serious need of renovation. Without the £13.2million HLF grant for the New Century Project, the museum's facilities would have grown outdated and inadequate, threatening permanent closure.

HLF funding has resulted in a transformed attraction with six additional public galleries, twice the number of objects on display, two 'object cinemas', a 150-seat lecture theatre, a restaurant and new cafés. The display of the museum's collections also underwent a radical overhaul, with galleries redesigned so that objects are shown in a way that tells a story, rather than using traditional arrangements based on chronology or origin.

A total of 2,232,475 visitors were recorded in 2007 – more than twice as many as were visiting before the renovation. Though the majority (54%) of visitors come from within Glasgow and a further

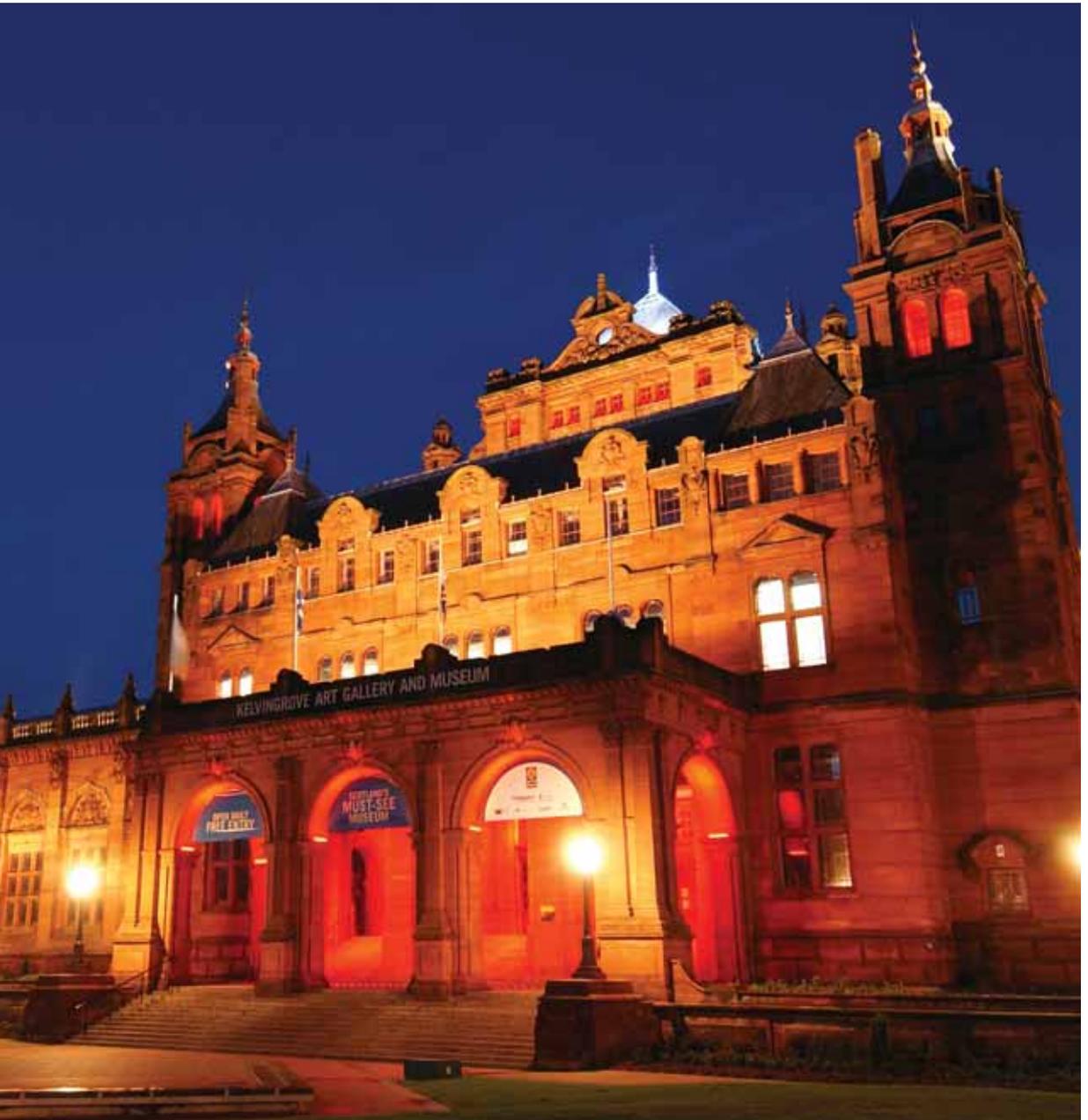


Economic impacts summary

| | Employment (FTE) | | GVA (£'000) | |
|--|------------------|------------|--------------|--------------|
| | Local | Regional | Local | Regional |
| Staffing | 43 | 43 | 778 | 778 |
| Suppliers, visitor expenditures and multiplier impacts | 108 | 110 | 2,891 | 2,856 |
| Total | 151 | 153 | 3,669 | 3,634 |



Local jobs created





25% are from the rest of Scotland, a fifth are from outside the country, including 8% from overseas.

The ongoing economic impacts of the project have been substantial. The museum has created 43 new jobs in the management and day-to-day running of the facilities. Visitor expenditures are estimated to support a further 108 jobs within Glasgow and 110 jobs in the wider regional economy of central Scotland. In total, the project is estimated to have created 151 local jobs, and is generating GVA of £3.7million per year.

Big Pit: National Coal Museum

HLF grant
£5,278,000

Completion date
April 2004

The idea for a mining museum in Blaenavon first came about in the 1970s, at a time when the coal industry was being convulsed by strikes and colliery closures. Local people felt the pressing need to preserve and display the mining heritage of south Wales before it was lost forever. From that desire to remember the past, Big Pit has emerged as one of the most exciting new heritage attractions of the past decade.

The museum occupies the site of a colliery sunk by the Blaenavon Company in 1860. The colliery closed in 1980, and the museum was set up and opened in 1983. By the 1990s it had become the most successful coal-mining museum in the UK – largely because of the underground tours led by real miners. But, managed by an independent trust, the museum's future was not assured. Competition from newer attractions was increasing, and running costs were rising as the mining industry continued to contract. Investment in the pit-shaft and surface displays was badly needed, and without restoration there was a great risk of closure.

The HLF-funded project involved the restoration of 19 buildings, including the fan house, the pithead baths, welfare facilities and lamp room, the winding house and the forge. The HLF funding was also used to create a conservation workshop, a study centre and new



Economic impacts summary

| | Employment (FTE) | | GVA (£'000) | |
|--|------------------|------------|--------------|--------------|
| | Local | Regional | Local | Regional |
| Staffing | 58 | 58 | 1,500 | 1,500 |
| Suppliers, visitor expenditures and multiplier impacts | 26 | 61 | 744 | 1,924 |
| Total | 84 | 119 | 2,244 | 3,424 |





Local jobs created

exhibition areas. With funding in place, the National Museum of Wales took over the management of the museum, securing its long-term financial future. After its relaunch in 2004, Big Pit quickly went on to win the prestigious Gulbenkian prize for Museum of the Year in 2005, and was voted 'Favourite National Treasure' of Wales in a public television vote.

Visitor numbers have greatly exceeded expectations. There were 159,000 visits in 2007 and 165,000 in 2008 – compared to annual totals of less than 90,000 in the second half of the 1990s. The scale of operations means that employment on site has increased to a total of 65 staff. There are new posts in curating, education, administration and conservation, as well as more jobs in catering and guiding. Without the restoration, it is unlikely that any of these jobs would now exist. More staff work throughout the year because the peak season has grown and the museum is open all year long. Big Pit is now a free attraction, but there have been substantial increases in shop sales and income from catering. The museum's overall economic impact has been estimated at an annual £2.2million of GVA within the local economy.

Big Pit's redevelopment has happened alongside the designation of the Blaenavon Industrial Landscape as a World Heritage Site and there is great potential to attract even more visitors to the area. The long-term future of Big Pit is being addressed by the setting up of apprenticeship schemes to ensure that the underground experience – the original inspiration for the museum, and the feature that pulls visitors in and draws them back again – will still be there for future generations to enjoy.

De La Warr Pavilion

HLF grant
£2,300,000

Completion date
October 2005

With its panoramic view of the Channel, Bexhill-on-Sea's De La Warr Pavilion was the first Modernist public building to be built in the UK. Commissioned by the 9th Earl of De La Warr and designed by Erich Mendelsohn and Serge Chermayeff, it opened in 1935. The design was always intended to be pioneering in spirit as well as structure – this was a spectacular steel-and-concrete creation that aimed to improve both the spiritual and physical life of the people of Bexhill.

By the start of this century, with the Pavilion tired and run-down, refurbishment was conceived as a way of restoring the iconic Grade I listed building to its original condition and purpose.

A new environmentally controlled gallery space complements the existing exhibition areas, whilst the original 1,000-seat auditorium has been updated. A new studio space accommodates modern education facilities, while the café and restaurant boast stunning sea views and give access to a sun-terrace. The shop sells a range of designer furniture, in addition to books and souvenirs.

The De La Warr Pavilion is already proving itself as a destination for cultural visitors, and attracting national and international media attention. It received over half a million visits in its first year of completion – a 60% increase on the pre-refurbishment figure.

Seventy-seven staff are employed on site, compared to a team of only 30 prior to the redevelopment. Visitor surveys indicate that over 70% of visitors come from outside of the local district, with three-quarters of staying visitors travelling to Bexhill specifically to see the Pavilion.

Economic impacts are therefore strong, with a further 67 jobs created within the local tourism economy, and more than £1million generated in annual value added through profits and wages for businesses and employees.

Economic impacts summary

| | Employment (FTE) | | GVA (£'000) | |
|--|------------------|-----------|--------------|--------------|
| | Local | Regional | Local | Regional |
| Staffing | 36 | 36 | 465 | 465 |
| Suppliers, visitor expenditures and multiplier impacts | 67 | 57 | 865 | 735 |
| Total | 103 | 93 | 1,330 | 1,200 |



Local jobs created



Locomotion, the National Railway Museum at Shildon

HLF grant
£5,047,000

Completion date
September 2004



Economic impacts summary

| | Employment (FTE) | | GVA (£'000) | |
|--|------------------|-----------|--------------|--------------|
| | Local | Regional | Local | Regional |
| Staffing | 18 | 18 | 877 | 637 |
| Suppliers, visitor expenditures and multiplier impacts | 56 | 74 | 2,728 | 2,333 |
| Total | 74 | 92 | 3,605 | 2,970 |



Local jobs created

Locomotion is a branch of York's National Railway Museum (NRM). It is located in Shildon, County Durham, from where the first steam-hauled train began its maiden journey in 1825. The museum not only provides space in which to display part of the NRM's vast collections, but also highlights the important role that Shildon and its people had in shaping the modern world.

The town was a central point for the construction and repair of locomotives and wagons until the wagon works closed in 1985. Faced with the consequent loss of employment, Sedgfield Borough Council introduced a package of measures aimed at regenerating the town's economy, shaking off Shildon's dependency on a single major employer and creating a more diverse employment base.

The HLF-funded project involved the refurbishment of the existing Shildon museum and the construction of a brand new collections centre at the site. As well as the exhibition of 70 vehicles from the NRM's collections, there is a steam-train ride that operates around 40 days a year. The museum also hosts between 40 and 50 events each year, including collectors' fairs, car rallies, traction-engine rallies and drama and music events, in addition to the many railway-based activities.

Now operated in partnership with Durham County Council, Locomotion employs 18 staff, primarily in front-of-house roles, along with office staff and a supervisor for the museum's workshop.

The redeveloped museum had a target of 63,000 visits per year – a figure that was easily exceeded within the first six months of reopening. Since the refurbishment, Locomotion has been attracting around 150,000 visits a year. There is an almost equal mix of visitors coming on day trips and those on a longer stay in the area, with around a third of visitors from outside the North East. For 94% of visitors, Locomotion was the primary purpose of their visit to Shildon – a very strong 'heritage motivation' factor. The impact of these visitors has been to create a further 92 jobs within the regional economy.

The swing towards domestic tourism: blip or trend?

Dame Fiona Reynolds,
Director-General of the National Trust



2009 was a sensational year for heritage tourism, and for the National Trust in particular. While much of the economy was in a fragile state, we experienced nothing less than a boom – visitor numbers up by 17.5%, commercial profits up 40%, membership reaching a staggering 3.8 million – and our visitor-enjoyment scores also went up by 10%.

Of course, there were wider economic factors at work here – the weak pound and the general economic downturn meant that 2009 was the year of the staycation. Many National Trust properties were heaving all year, and there is nothing more important to us than feeling that we are meeting a genuine human need for beauty, and for physical and spiritual refreshment.

“ In a world obsessed with materialism and instant gratification, people are hungry for the ‘real thing’ – the authentic experience that beautiful, distinctive places can offer. ”

For our statutory purpose is just that: to connect people with things that matter – nature, beauty, history, family, community. We look after more than 300 historic buildings and properties open to the public, as well as 250,000 hectares of open countryside and more than 700 miles of stunning coastline. Over 16 million people visited our pay-for-entry properties during 2009; and we estimate that visits to our

coast and countryside, for which there is no charge, stand at more than 50 million. We are the country’s largest single – if dispersed – museum (150 of our properties are accredited), and one of the nation’s largest providers of holiday cottages, restaurants and shops. We are a major force within the UK tourist economy.

The big question is, of course, whether 2009 was a blip or a trend. We were not alone in benefiting from this swing towards domestic tourism. But we felt there was something more: a sense that, in a world increasingly obsessed with materialism and instant gratification, people are hungry for the ‘real thing’ – the authentic experience that beautiful, distinctive places can offer. So our marketing campaigns encourage people to feel that time spent in beautiful countryside or historic sites truly is ‘time well spent’ – a message that has prompted a genuinely positive response.

Whatever happens in the wider economy, we don't believe that this fundamental proposition will change. We all live increasingly busy and frenetic lives, yet, as time goes on, people value more and more the simple pleasures of life that don't cost a fortune to enjoy – time spent with family and friends, a picnic in a flower-rich meadow, a beautiful view, a wonderful work of art or architecture, connecting with a moment in history.

“ All this activity benefits the wider economy, not least in helping reduce the balance-of-payments deficit on the UK's international-tourism account, and in promoting local economic recovery. ”

All this activity has two fundamental benefits. Obviously it benefits the wider economy, not least in helping reduce the balance-of-payments deficit on the UK's international-tourism account, and in promoting local economic recovery. We highlighted this in our series of *Valuing our environment* research reports, which calculated that, in places such as Cumbria, the South West, Wales and the North East,

40% of employment in tourism depends directly on a high-quality environment, rising to between 60% and 70% in rural areas. The research also quantified the Trust's role in the UK tourism economy. In the four regions examined, for each job we created we generated between five and nine additional FTE posts. Multiplier effects such as these help to underline just how significant tourism is to the overall UK economy, as well as to the places that depend on it. There are many examples of just these forces at work throughout this report, such that tourism as a powerful economic agent is surely without doubt.

But perhaps even more importantly, exploring our beautiful countryside and historic places benefits the nation's health and wellbeing. Happiness is an increasingly elusive phenomenon. It cannot be manufactured, nor its value easily calculated. But we know it matters, and we also know that, when achieved, its value is beyond price. At the Trust we feel incredibly fortunate to be part of something that makes people happy – what could be better than that?

Reconnecting heritage and the visitor economy

Bill Ferris, Chair of the Association of Independent Museums and Chief Executive of Chatham Historic Dockyard Trust



It is hard to understand why the link between heritage assets and value generated through the visitor economy surrounding them seems to have had to be rediscovered. From the days of the Grand Tour to the huge success as measured by visitor numbers to the newly reopened Ashmolean Museum in Oxford, the evidence is there for all to see. Heritage motivates people to travel in order to quench their thirst for knowledge, to reinforce their place in history and contextualise a place geographically and socially. In doing this, they spend considerable sums of money to the benefit of the place and, hopefully, the heritage.

“Who could argue about the impact of heritage assets on the economy of places such as York, Canterbury, Oxford and other cities?”

The commercial, independent-museum and tourism sectors have recognised this for years. The early 1980s saw a boom in the development of heritage-based attractions where modern interpretation – which was accurate, accessible, popular and even entertaining – led to success.

Many independent museums were funded as economic-development (tourism) projects as well as heritage projects, with local authorities connecting the visitor economy with the sense of place, identity and community. Notable successes include the Ironbridge Gorge museums, Historic Dockyard Chatham, Ulster Folk and Transport Museum, and Dundee Heritage Trust. Other attractions, such as the Jorvik Viking Centre in York, were inspired by academics and enthusiasts who saw exciting interpretation as a way to explain history to huge numbers of paying visitors, and in so doing finance research and publications. Who could argue about the impact of heritage assets on the economy of places such as York, Canterbury, Oxford and other cities?

What links these examples is that they are all based on authentic heritage assets with a strong sense of their purpose and their part in the regional economy, and a total commitment to historical accuracy. As a result, millions of visitors have been drawn in, driving economic recovery in places that have not traditionally been tourist destinations, and helping to restore local pride and identity.

“ As a result (of attractions being based on authentic heritage assets), millions of visitors have been drawn in, driving economic recovery in places that have not traditionally been tourist destinations.”

So, with such incontrovertible evidence, why is there a need to reinforce the case for the economic benefit derived from heritage tourism? The answer probably relates to a concurrent boom in what became known as ‘plastic’ heritage. That plethora of ill-conceived heritage centres and attractions that failed in the 1990s and the early years of the 21st century may be responsible for much of the separation of heritage and the visitor

economy. Even well-thought-out projects such as the White Cliffs Experience have suffered. White Cliffs attracted hundreds of thousands of visitors and met its original objective of stimulating visits to Dover town centre, but closed after 10 years. This is because the cost of marketing and keeping up to date an essentially multi-media exposition, rather than an attraction based on a heritage asset, was considered prohibitive. There are many more examples that have performed much worse and contributed to the disconnection between heritage and the visitor economy, especially with regards to economic development.

Quite rightly, heritage is once again being seen as part of the UK’s economic future. In saying this, we must take care not to slide back into the traps exposed by previous failure. HLF can take credit for its assessment of applicant proposals – ensuring that project sustainability, audience development and accessibility are considered of equal importance to the heritage asset. This joined-up approach has put heritage back at the centre of economic prosperity.

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Heritage Lottery Fund
Head office
7 Holbein Place
London
SW1W 8NR

Telephone 020 7591 6000
Email enquire@hlf.org.uk
Website www.hlf.org.uk
HLF helpline 020 7591 6042
Textphone 020 7591 6255

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