

Economic Impact of Heritage in Yorkshire and Humber

March 2010

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Version	Date	Amended by	Principal Changes
5	5 th March 2010	TTD/TS	Revised in line with Steering group Instructions
Final Version	5 th March 2010	Signed 	Reviewed by SK

**DRIVERS
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- 1. Case Studies**
- 2. Visitor Economy Impact**

Executive Summary and Key Findings

Introduction - Purpose and Scope of Study

- 1.1 It is widely accepted and understood that heritage makes a large and extremely important contribution to our sense of place, our quality of life, and certainly the attractiveness of the Yorkshire and Humber Region to tourists and visitors.
- 1.2 Exactly what this means in economic terms, however, has not yet been comprehensively detailed.
- 1.3 English Heritage have commissioned a study team, lead by Drivers Jonas LLP, to provide evidence to underpin the economic role of heritage in the Yorkshire and Humber Region. The study will principally be used in the forthcoming preparation of the Yorkshire and Humber Strategy.

Understanding Heritage

- 1.4 In **Part I** of the report, 19 case studies have been selected to provide a representation of heritage assets in the region.
- 1.5 From the case studies it is apparent that heritage is a platform for economic activity and is effective in creating and maintaining rural employment. There are significant benefits in bringing heritage buildings back to life, both for developers who, for example, can profit from creating office space with character which inherently different from the typical model on the market, and also for occupiers who can benefit from significant energy savings in re-use of solid building construction.
- 1.6 Heritage provides robust property during difficult economic times, and has had dramatic impacts on townscape level by providing niche retail space.

Measuring the Economic Impact of Heritage

- 1.7 The economic impact of heritage in the Yorkshire and Humber is measured in **Part II**. This has been done by using a top down approach (regional to local) which has been 'sense-checked' by a bottom up approach (local to regional), as there is no clear methodology available to use.
- 1.8 It is estimated that:
 - n **37 million day visitors** came to the region with a heritage-related activity being the main purpose of their trip.
 - n **3 million staying visitors** came to the region with this being the main reason for their trip.
 - n heritage tourism is directly responsible for generating in excess of **£2.1 billion visitor expenditure** annually at the regional level. This equates to **circa £45,000 jobs in the region**.
 - n approximately **5,198 FT jobs** are supported through the management and operation of heritage assets, while conservation and maintenance of heritage assets supports approximately **18,000FTE jobs**.

Codes included in the side bar indicate specific areas of evidence in support of the Yorkshire and the Humber Strategy evidence base key areas of concern to Yorkshire Forward and the LGYH.

On a conservative basis, using a tightly focused definition of heritage, the GVA impact of the region's heritage assets could be circa £1.7 billion per annum based upon the employment impacts identified. This equates to approximately 10% of the total regional GVA.

On a less conservative basis, using a wider definition of heritage, the GVA impact of the region's heritage assets could be circa £3.1 billion per annum based upon the employment impacts identified. This equates to in excess of 15% of the total regional GVA.

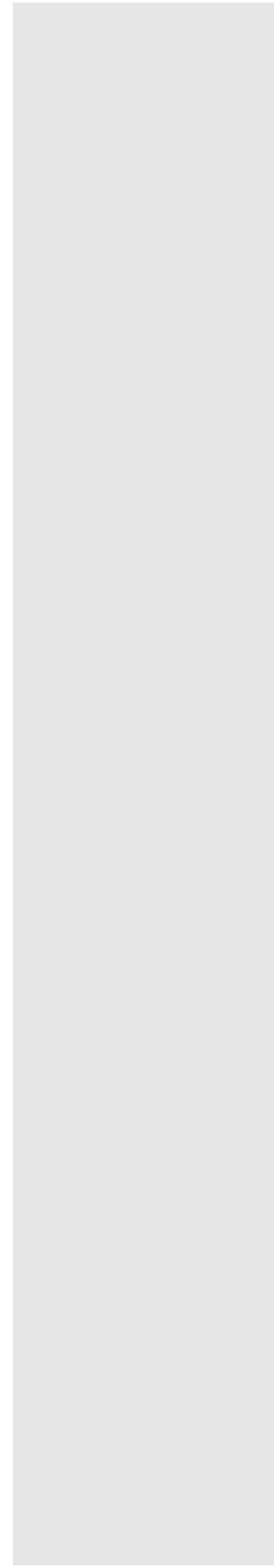
Maximising Impact of Heritage

- 1.9 In **Part III** the team have identified areas where the impact of heritage can be maximised. The greatest value for money in increasing economic activity by investing in heritage comes from:
- n **raising the profile** of heritage assets to increase visitor numbers and spend (often through joint marketing initiatives);
 - n **diversification** by bringing new activities or uses to heritage assets, enabling income to be generated to underpinning the upkeep of the asset;
 - n relatively modest **investment** in townscapes to bring about effective renaissance/regeneration;
 - n **partnership working** with other stakeholders;
 - n effective use of policy and its application.
- 1.10 The study team believe that there are particular opportunities in the region to bring forward schemes in landmark heritage buildings in town centres that have fallen out of use – ‘dead landmarks’.
- 1.11 Key recommendations are to build on the following:
- n the opportunity to **make better use of post-industrial revolution heritage** –which the Sheffield City Region and Leeds City Region are rich in;
 - n **promote groups of assets** which can be very powerful in attracting visitors from outside the region;
 - n encourage Local Authorities and other stakeholders to **consider the opportunities heritage can provide as a core renaissance/regeneration theme in a town** to ensure that heritage assets are providing the greatest input to economic growth they can;
 - n given the increase in holidays within the UK and the expected increase in this trend, **promote the region as a heritage holiday destination**;
 - n help building owners think through the potential to re-use heritage buildings for holiday let accommodation;
 - n use the current property market slow-down to build developer awareness of opportunities and best practice with heritage buildings;
 - n provide guidance on the type of office environment that can be provided in heritage buildings and the issues/cost involved;

- n potential to **assist developers and Local Authorities to think through alternative uses** that are less impacted by markets, need to be in town centres and are sustainable;
- n develop a closer and more supportive relationship with Conservation Officers; and
- n to **ensure that heritage is considered at the outset of site masterplanning**, could there be potential for English Heritage to offer an advisory service to developers?

Conclusion

1.12 It is clear that the region benefits from the positive economic impact of heritage. There is a strong case for continued investment in the heritage assets of the region, both financially and through the appropriate policy framework.



1. Introduction

- 1.13 English Heritage commissioned this study to assess and articulate the contribution which the historic assets of the Region make to the economic well-being of Yorkshire and the Humber Region. This was to overcome a lack of existing information on the quantitative impact of heritage assets in the region.
- 1.14 For this study, heritage is considered to comprise material evidence which physically documents aspects of the social and economic development of the region. This includes:
- n built heritage – comprising listed buildings and conservation areas;
 - n archaeology and historic landscapes – comprising scheduled ancient monuments, battlefields and registered parks and gardens;
 - n archives and collections – comprising museums, galleries, archives and their collections; together with
 - n historic events – comprising events and activities that have developed historical significance; and
 - n wider historic environment and townscapes/landscapes made up of thousands of undesignated assets and individual features which give places their special character.

Codes included in the side bar indicate specific areas of evidence in support of the Yorkshire and the Humber Strategy evidence base key areas of concern to Yorkshire Forward and the LGYH.

Purpose of Study

- 1.15 The principal purpose of the study is to provide evidence to underpin the role of heritage in the emerging Yorkshire and Humber Strategy for the region. To meet this challenge, the study is presented in three parts.

Part I – Understanding the Economic Impacts of Heritage

- n Through the qualitative consideration of case studies the study highlights the range of different impacts that historic assets can have. It also identifies some historic assets or investments in historic assets that have been particularly effective in producing a very positive economic impact in the region.

Part II – Measuring the Economic Impact of Heritage

- n A quantitative assessment of the overall economic impact of historic assets to the region and its four sub-regions.

Part III – Maximising the Economic Impact of Heritage

- n Finally, the study seeks to sign-post where the best potential may be for heritage assets to have the greatest economic impacts in the years ahead in the region. The intention is for this analysis to support consideration of future investments in historic assets.

Study Team

- 1.16 English Heritage is leading the work on this study on behalf of a Steering Group comprising representatives of:
- n Welcome to Yorkshire;
 - n Yorkshire Forward;

- n Local Government;
 - n Functional sub-regions; and
 - n the National Trust.
- 1.17 A consultant team led by Drivers Jonas LLP ('Drivers Jonas') was appointed to assist in the preparation of the study. Drivers Jonas is a firm of Chartered Surveyors and Town Planners with particular experience in the role of heritage buildings in regeneration.
- 1.18 The Drivers Jonas team also includes:
- n GENECON LLP – a leading national practice specialising in economic and spatial regeneration.
 - n Locum Consulting – the UK's leading consultancy practice specialising in destinations.

The Challenge

- 1.19 Measuring the economic impact of heritage is a challenging endeavour, not least as a result of the wide range of different impacts it can have. Previous work, including "Heritage Works – the use of historic buildings in regeneration" summarised the range of values attributable to heritage:
- n Use value – direct and indirect
 - n Non-use values such as:
 - n Bequest value
 - n Altruistic value
 - n Existence value
 - n Economic benefits arising from heritage activity
 - n Strategic added value
 - n Wider impacts on the vitality of urban and rural areas.
- 1.20 This study considers the principal work undertaken previously in the field and the methods utilised. The greatest economic impact flows from visitor/tourism activity motivated by heritage. The study seeks to provide a robust approach to measuring the impact of heritage in Yorkshire and the Humber on tourism by using two separate processes. By utilising discrete "top down" and "bottom up" methodologies, the results of each can be compared to help give rigour to the findings.

PART I – UNDERSTANDING THE ECONOMIC IMPACT OF HERITAGE

2. Case Studies

- 2.1 To help to demonstrate the type and extent of economic impacts that heritage assets can have in the sub-regions and the region, a number of case studies have been undertaken. These have involved desktop research together with visiting the heritage asset and meeting its custodians to discuss its impact on economic activity.
- 2.2 The case studies were selected by the project team to represent the range and scale of heritage assets and each of the sub-regions. The case studies fall under the following Functional Sub Regions:

Sheffield City Region

- n Wentworth Castle, Barnsley
- n Kelham Island, Sheffield
- n Sheffield Botanical Gardens, Sheffield
- n Heritage Inspired - Rotherham Tourism Churches Initiative

Hull and Humber Ports Functional Sub Region

- n Beverley townscape
- n South Humber Project, Barton
- n The Marina, Hull
- n Albion Mill, Willerby

Leeds City Region

- n Courtyard Offices, Nostell Priory
- n Hebden Bridge townscape
- n Holbeck Urban Village
- n Wakefield Waterfront
- n Salts Mill, Saltaire





York and North Yorkshire Functional Sub Region

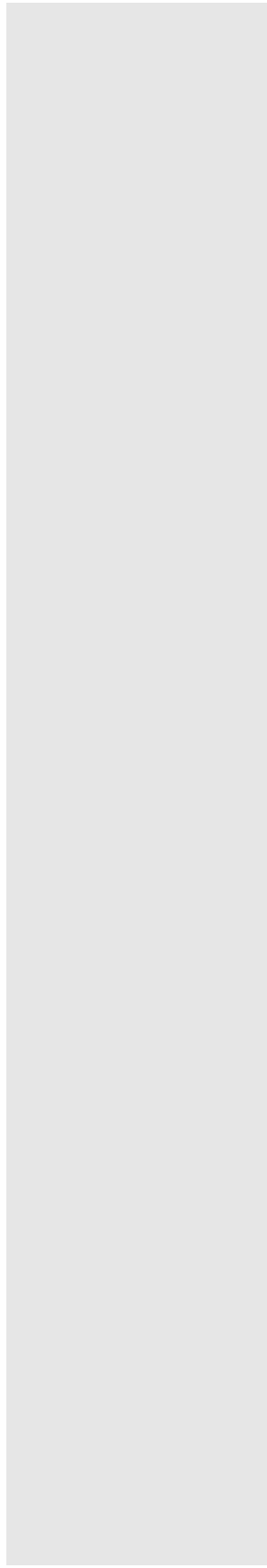
- n Fountain's Abbey
- n Richmond townscape
- n York townscape
- n Royal Hall, Harrogate
- n Castle Howard Estate

- 2.3 The table below lists the case studies and provides a brief description of the key features of the case study:

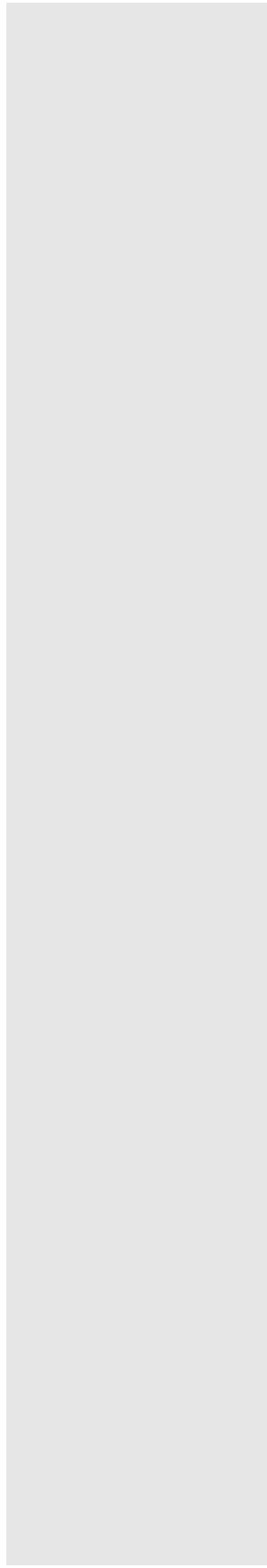
Figure 2.1: Case Study Summary

Landmarks

	<p>Castle Howard</p> <p>Castle Howard Estate comprises approximately 10,000 acres with a nationally known house. It is a popular visitor attraction, attracting over 200,000 per year.</p> <ul style="list-style-type: none"> § illustrative of potential employment generation of heritage asset § maintains social responsibility to community § forward thinking management plan
	<p>Nostell Priory Estate Yard</p> <p>Re-use of former farm buildings for successful office use.</p> <ul style="list-style-type: none"> § provides economic and social opportunities to the community § high quality office space in heritage buildings provides alternative accommodation
	<p>Albion Mills</p> <p>Re-use of former mill as office space for the Environment Agency.</p> <ul style="list-style-type: none"> § major cost savings for Environment Agency compared to new build accommodation § significant carbon savings in re-use of building and lower energy use and costs than previous accommodation
	<p>Wentworth Castle</p> <p>Revitalised through a step change in its profile and now a successful visitor attraction with over 50,000 visitors per year.</p> <ul style="list-style-type: none"> § 312% increase in visitor numbers as a result of £16m investment § employs 35 staff from local area

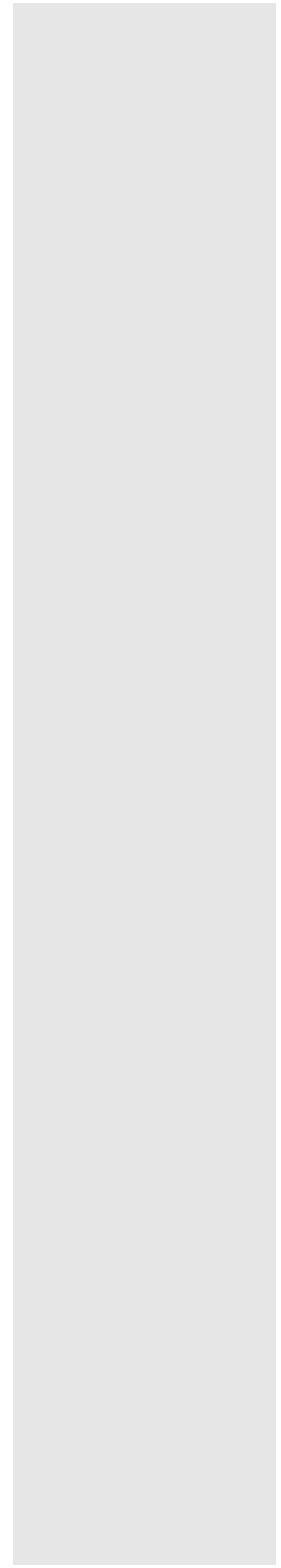


	<p>Sheffield Botanical Gardens Investment in botanical gardens, resulting in reinvigorated gardens and increased visitor numbers.</p> <ul style="list-style-type: none"> § £6.6m restoration § Investment has resulted in 60% increase in visitor numbers § Attracts visitors from outside city and region area
	<p>The South Humber Project Grouping of a range of heritage assets under one brand umbrella</p> <ul style="list-style-type: none"> § Marketing initiative to group assets § Simple, cost effective approach with positive impact
	<p>Church Tourism - Heritage Inspired Successful promotion of faith sites</p> <ul style="list-style-type: none"> § Increased confidence in Church tourism § Promotes importance of interpretation

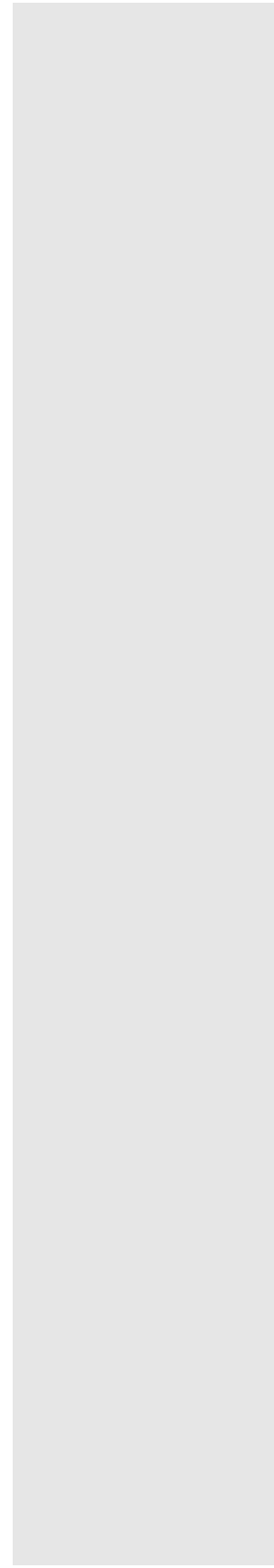


	<p>Salts Mill Visionary redevelopment of former mill</p>
	<ul style="list-style-type: none"> § mill saved from dereliction § successfully provides unconventional retail space § now a World Heritage Site
	<p>Fountains Abbey and Studley Royal Ruined Cistercian monastery and extensive park</p>
	<ul style="list-style-type: none"> § joint marketing, high employment on site § visitors a key driver of offer § investment in visitor centre highly successful and considered an attraction in its own right. § World Heritage Site
	<p>Royal Hall Multi functional concert and conference centre</p>
	<ul style="list-style-type: none"> § Provides vital, unique offer within conference market § Investment in the heritage asset has been important in promoting the area as a conference venue.
<p>Townscapes</p>	
	<p>Beverley Town Centre Public realm investment</p>
	<ul style="list-style-type: none"> § heritage key driver of economy § heritage townscape provides attractive accommodation to niche retail § investment is attracting high quality tenants

	<p>Hebden Bridge Thriving town in a heritage townscape</p> <ul style="list-style-type: none"> § investment in heritage townscape has increased footfall in main retail areas. § heritage is key driver of economy § heritage townscape provides attractive accommodation to niche retail
	<p>Holbeck Urban Village Regeneration of a mixed use quarter of Leeds led by heritage buildings</p> <ul style="list-style-type: none"> § heritage provided clear branding and marketing opportunities § investment in heritage provided quality standard
	<p>Hull Investment in heritage marina resulting in successful use for high profile events such as the clipper race</p> <ul style="list-style-type: none"> § investment has allowed the area to re-open for business and the public, in addition to being appropriate for world class events such as the clipper race.



	<p>Kelham Island Sheffield</p> <p>Early designation as a conservation area followed by investment to regenerate and kick start development activity</p> <ul style="list-style-type: none"> § designation as conservation area and establishment of Conservation Area Partnership gave private developers confidence to invest § drastically improved perception and image of riverside area
	<p>Richmond</p> <p>Traditional market town revitalised by small scale investment in the town centre heritage backdrop increasing visitors and economic vitality</p> <ul style="list-style-type: none"> § Heritage townscape enables Richmond to compete effectively with surrounding towns because of its unique high quality offer § Redundant assets have been transformed into viable economic drivers
	<p>York City Centre</p> <p>City centre dominated by heritage townscapes which has a huge impact on the nature and scale of the economy in the city centre</p> <ul style="list-style-type: none"> § relatively unaffected by the recession through strength of heritage related sectors § maintains high Zone A rent indicating popular retail destination
	<p>Wakefield Waterfront</p> <p>Redevelopment of historic area provides Wakefield with high quality office and residential accommodation</p> <ul style="list-style-type: none"> § quality of re-use of heritage building attracts premium post recession value § heritage provided platform for regeneration and economic growth



2.4 Full details of the case studies can be found at Appendix 1.

Findings

2.5 The case studies have demonstrated a number of findings within the economic impact that heritage assets have generated in Yorkshire and the Humber.

Heritage buildings provide a platform for economic activity

2.6 Heritage buildings provide accommodation for economic activity in the region in three principal ways.

i. For office based businesses

Several case studies demonstrate where heritage buildings provide office accommodation for businesses – often in locations where modern office supply is limited or absent, and often to a higher quality than modern space.

2.7 Heritage buildings can play a key role in attracting office occupiers and the employment they bring to a district. Many occupiers perceive heritage buildings as being equivalent to new Grade A office buildings in the image they project about the quality and credibility of the occupying businesses. This has been seen very clearly in Leeds with the popularity of Holbeck Urban Village to creative businesses such as architects and design agencies.

ES11, C2

2.8 Heritage buildings are often considered by the property industry to provide inefficient office environments that do not support modern ways of working. This is not always accurate. There are many examples throughout the region of modern office spaces having been created in older buildings, including Albion Mill, Round Foundry and Marshalls Mill.

2.9 It is arguable that, in overall terms, the property industry does not always serve small and medium sized enterprises (SMEs) well. The property industry turns on the valuation of completed buildings and the occupiers they contain. Valuations favour larger, more established enterprises over newer or smaller ones. The example below demonstrates how the same building with the same rent would be valued differently depending on the occupier:

SR3

	Example 1	Example 2
Occupier	Blue chip large company	Small or start-up company
Building Size	5,000sq ft	5,000sq ft
Rental Rate	£15.00psf	£15.00psf
Annual Rent	£75,000	£75,000
Investment Yield	6.5%	9%
Year's Purchase in Perpetuity	15.3	11.1
Gross Value	£1.15 million	£0.83 million

- 2.10 This means that SMEs can either be: overlooked for the best quality space; forced into taking a longer and more onerous lease than ideal; or pushed down the serviced office route (which whilst flexible can be very expensive). Several of the heritage office schemes that have been delivered provide SMEs with high quality space on lease lengths that are shorter, and they are more comfortable with, and at significantly lower cost than serviced office space. Examples include Holbeck Urban Village, Richmond Station and Shine in Harehills, Leeds. In this way, heritage buildings provide one of Adam Smith’s key factors of production – land – to SMEs in a way that helps businesses to start or grow and aides their long term viability. This is particularly key in helping businesses make the step change from 1 or 2 people working from home, to 4 to 6 people working in an office.
- 2.11 An emerging trend that is very likely to become more prevalent going forwards is the decision of occupiers to re-use older buildings to meet environmental or corporate social responsibility policies. With many businesses and sectors thinking about the carbon impact of their activities, maintaining the embedded energy in an old building and avoiding the landfill created and energy consumed in new construction can have a disproportionately high impact on reducing an organisations environmental footprint. This motivation has been demonstrated at all scales in the region, from SMEs to Government bodies such as the Environment Agency and Local Authorities.
- 2.12 In addition, heritage buildings can often provide “local” solutions to the provision of accommodation and business space, with a quality product. This can enable businesses to avoid taking space in larger towns and cities, avoiding the need to travel and also supporting local economic activity.

ES22, SR3

ii. For cultural and sporting events

Heritage assets host a wide range of cultural and sporting events – enabling the viability of those events and also generating an income that can be re-invested in the heritage asset.

- 2.13 Throughout the region, heritage assets provide a venue/backdrop for cultural and sporting events. These range in scale from local events in Church Halls, through regionally significant events at venues such as Fountains Abbey, Harewood House and Castle Howard, to international events such as the Clipper sailing festival at Hull Marina.
- 2.14 In the majority of cases, the heritage asset has been key in underpinning the viability of the event. Such events can be staged at heritage assets in more rural locations at lower cost than in comparable venues in city centre locations. Not least the car parking provision for special events is much more easily satisfied in rural areas by temporarily using grounds/fields. Organisers will also generally have longer times available to set up and break down an event than in a comparable city centre venue. Without the flexibility and lower cost base that heritage assets can provide, less events would be run in the region. At the Bramham Estate in West Yorkshire, the hosting of music festivals in the summer months has provided income which has been invested back into the heritage assets on the estate, giving something of a virtuous circle.

C2,C3,ES2,QLE1

iii. For business events

The region's heritage has been used to good effect in attracting business events

- 2.15 The Royal Hall at Harrogate demonstrates the positive impact that high quality heritage assets can have in attracting business and conferencing events. In this instance, the character of the heritage space gives the event organiser the ability to set a tone of very high quality for key speeches and "award" dinners in a location adjacent to the main conferencing area, which raises the overall attractiveness of Harrogate and does encourage activity. The Royal Hall sets the Harrogate Conference Centre offer apart from rival conferencing locations.
- 2.16 At smaller scale, the same principles also apply as shown by the events hosted at the Round Foundry and Shine.

ES2, ES3, ES11

Rural Employment

Heritage assets are at the forefront of employment being retained and generated in rural areas.

- 2.17 In the post-war area there has been a dramatic decline in employment in rural areas, largely because of the mechanisation of the land based industries and loss of traditional skills. There is a strong policy focus to address rural deprivation and heritage assets can have a key role in creating and maintaining employment in rural locations.
- 2.18 Heritage landmarks by their nature provide long term employment in operation, maintenance and conservation. Improving the visitor numbers, spend and utilisation of heritage landmarks is a clear route to growing employment. The increase in employment at Sheffield Botanical Gardens, Wentworth Castle and The Ropewalk are examples of this.
- 2.19 The provision of office space in heritage assets (as described previously) can also be key to enabling entrepreneurs and SMEs to remain in or choose a rural location. Schemes that demonstrate this include Richmond Station and the Town Centre, Castle Howard, Broughton Estate, Nostell Yard and The Fathom Works. Without such platforms for business in heritage assets, employment would be likely to be drawn away from rural areas.
- 2.20 By providing employment opportunities in rural communities, commuting can be significantly reduced. This can have a number of impacts. To those prospective employees who have other commitments at home such as caring for the elderly or children, working close to home can make the difference between taking up work or being unable to work. Reduced commuting also reduces congestion and pollution. In some instances, however, where heritage office schemes have been particularly successful some employees have chosen to travel out from town centres to the rural office locations.

ES1, ES11

HR6

CCER9

T1, T2, T3

Latent potential of redundant or under-used heritage buildings

Under-used or redundant heritage buildings provide opportunities for economic activity to be developed.

- 2.21 Heritage buildings that have fallen out of use provide a latent potential for increasing economic activity, often in areas requiring a diversification or enhancement of the local economy. Particularly where the building is protected by listing status and there is a presumption in favour of its preservation, it provides the opportunity for the space to be put to alternative use. In addition, where a building has been out of economic use for a period of time, the owner is more likely to consider novel or unusual uses than the owner of a modern building with established demand.
- 2.22 Whilst the cost of restoring and maintaining heritage buildings can be significant in many cases, in other cases they provide a lower cost and more deliverable alternative than providing a new building. This is particularly the case where the building has been in long term ownership, has no debt secured upon it and is, in effect, a sunk cost. In such a case, the affordability hurdle to overcome in making the building ready for economic use could be much, much less than providing a new building. This provides a much less difficult route for both the building owner and potential occupiers to bring about economic activity in the space.

C2,C3,,ES2,CCER7

HR6, HR7, CCER9

Quality of Place

The perceptions and confidence that people feel in a location, and the sense of place and its quality, can be very positively impacted by heritage

- 2.23 The townscape case studies have demonstrated very clearly the key role that heritage buildings play in changing perceptions of towns and creating a sense of place. Heritage townscapes are often instrumental in determining the character of a town or city and often have a distinctive and important role to place in the overall offer.
- 2.24 Kelham Island demonstrates this impact very clearly. The area had fallen out of beneficial economic use and had become colonised by undesirable activities including crime, prostitution and drug use. The area had become a no go part of Sheffield to many of the city's residents and visitors. The formation of a Conservation Area Partnership, to promote a vision, policy and provide grant assistance for heritage building improvements, was key in halting the decline and changing the way land owners and occupiers perceived the location.
- 2.25 The work of the Conservation Area Partnership then gave private sector investors who shared the vision for Kelham Island the confidence to make significant investment, most notably Gleeson's investment in the Cornish Works residential scheme. The residential units delivered sold off plan. Whilst the heady condition of the city living residential market was undoubtedly a factor, it is nonetheless remarkable that within 5 years an area notorious for drugs and prostitution saw such demand for residential units that people slept in their cars to be able to secure an apartment at Cornish Works.
- 2.26 In Richmond, promoting the town's renaissance on the basis of a "heritage" theme has provided significant benefits. In addition to the restoration of a number of the properties, which has contributed strongly to an enhanced sense of place, the improvements have attracted a range of business users and increased the vitality of the

C2, ES2, ES3, ES11,

HR6 HR7, SP3

HR7,SP3

- town centre. Richmond is a much improved and “healthier” town as a result.
- 2.27 Similar changes in perception and economic turnarounds have been delivered, and continue to be delivered, in other cities in the region including at Wakefield Waterfront, The Calls in Leeds and Hull Marina.
 - 2.28 In Hull the next phase of urban renaissance will be the revitalisation of the Fruit Market area by bringing the listed buildings back into use, whilst in Leeds the Tower Works scheme has commenced on site to better link Holbeck Urban Village with the city core.
 - 2.29 The Yorkshire and Humber region is rich in opportunities for this type of investment and the available evidence indicates it is a good use of resources. It is particularly notable how catalytic the heritage buildings are in bringing about change in parts of city centres. In most cases it is the heritage buildings which are refurbished and brought back into use first, to attract the early adopters and begin the change. This has been evident throughout the region at Cornish Works, Kelham Island, Round Foundry, Holbeck Urban Village and Eastbrook Hall, Bradford.
 - 2.30 Where a townscape is dominated by a large heritage building, a landmark, the building can become a barometer of the economic and social fortunes of a location. Where a major heritage building is in a prominent location but lies under-used or vacant, the perception of a whole town can be adversely affected. Examples of this include Gannex Mill at Elland. The long term empty building suggests decline and economic difficulty which leads to negative perceptions of the wider town, despite the town having a lively high street dominated by independent retailers and the delivery of significant new industrial business space in the town over the last 20 years.
 - 2.31 Conversely, where a landmark heritage building is brought back into use it can have an uplifting and catalytic impact on perceptions and the surrounding area such as Lister Mills in Manningham (Bradford), the Shine scheme in Harehills (Leeds) and Salts Mill at Saltaire/Shipley.
 - 2.32 Based on the experience within the region (and in other parts of the UK) identifying “dead landmarks” in town centres that bring about negative perceptions and intervening to catalyse change in them would be a worthwhile priority.

HR6

SP3

C2, HR6

Increasing Voluntary Activity and Education

Heritage assets encourage and provide a route for volunteering activity

- 2.33 A number of case studies have highlighted the role that heritage landmarks have in encouraging people to volunteer. Wentworth Castle has a team of 90 volunteers whilst Sheffield Botanical Gardens also has a volunteer group who assist with the upkeep and projects at the gardens.
- 2.34 Volunteer hours at National Trust properties for 2009 were 182,888. Multiplied by the minimum wage, this equates to a contribution worth over £1 million.
- 2.35 Volunteering has an important role within society and heritage assets provide an excellent opportunity for volunteering. The significant scope that heritage provides for people to volunteer and become closely

QLE2

involved in something that they believe is worthwhile is important. Volunteer activity has a wide range of social benefits, particularly for groups that may otherwise be isolated to some degree such as the elderly. Some of the benefits of volunteering are:

- n opportunities for retirees to give as many hours as they wish, providing a focus and activity during retirement;
- n opportunity to enhance or learn new skills;
- n a way to increase confidence for those out of work;
- n increased social network, which can be particularly important for retired people;
- n opportunities to involve young people and increase their self confidence;
- n health benefits, especially with more active roles; and
- n opportunities for businesses to volunteer as part of corporate responsibility programmes.

QLE1, ES9, ES2, ES11

2.36 Volunteering England commissioned a study by the University of Lampeter, which found that volunteering had positive benefits to peoples health¹:

QLE8

2.37 In economic terms, the principal benefits of volunteering are, first, the cost savings to the heritage assets of using volunteer labour which enables resources to be diverted into other areas of need, and second, the cost saved to healthcare services of having a fitter and more active volunteer population.

2.38 A further important part of volunteering in heritage is the role of local history and archaeology groups carrying out unpaid research and communication of the heritage of the places people live in. This in turn has a big impact on building people's sense of place and community.

2.39 The role of the region's heritage assets in assisting education at all levels – from primary school to Phd research – is very clear for a large number of the landmarks.

Benefits of Agglomeration

Where heritage assets can be marketed together, the overall impact of the assets can increase significantly

2.40 The advantages derived by heritage assets grouping their combined offer for promotion purposes has been seen in several case studies. Where smaller assets or townscapes have linked with others, a stronger overall offer to visitors is established that draws in more visitors and expenditure to the benefit of all. For heritage landmarks this has been seen most clearly with the South Barton project and also with the Sykes churches on the Yorkshire Wolds. For townscapes, this principle has been demonstrated in Richmond with the works to the retail streets and the railway station, and similarly in Holbeck Urban Village with the Round Foundry and Marshalls Mill.

ES2, QLE1, QLE6, QLE8

2.41 For both landmarks and townscapes serious consideration should be given to where coalescing a combined offer could give benefits. It is

¹ www.volunteering.co.uk

worth noting that this has the potential to be a very low cost initiative as the individual assets continue to do what they have always done - it is the presentation of the combined offer that changes.

- 2.42 Where heritage assets combine to form a more extensive offer, it encourages those visiting to change the basis of their visit from a day visit to one involving an overnight stay. As will be demonstrated in Part II, this significantly increases economic impact.
- 2.43 This is particularly key as the importance of the profile of heritage in attracting visitors and hence funding by income generation or grant is key. This was most clearly demonstrated by the step-change in fortunes of Wentworth Castle following its profile being raised dramatically through being featured on a television programme.

Heritage and Economic Conditions

In several instances, development schemes to convert heritage assets to business space have proven to be more resilient to downturns in economic conditions.

- 2.44 One of the features of heritage based regeneration in townscapes, in some circumstances and cases, is that its viability can be more robust to swings in the property market. For example, where a scheme is utilising an existing building and bringing it back into use, the cost of doing so might be much less than building a new building, which will significantly reduce the capital/funding requirement. This was the case at Albion Mill at Willerby.
- 2.45 This benefit of some heritage schemes can then be augmented where the scheme is aimed at small occupiers. Where a heritage building owner has embarked on a conversion or refurbishment aimed at small occupiers, they will have overcome at the outset the issues around SME covenants, building value and funding (none of which are particular to heritage buildings). They are likely to have found an alternative way to fund the scheme or perhaps change its scope to avoid the need for funding. This means that the delivery of heritage schemes of this nature are much less reliant on property investment market and funding conditions. So heritage schemes in some cases are more robust in recessionary times than conventional development schemes. This can be a key benefit in stimulating local economic activity where conventional development has stopped.
- 2.46 In other examples, the success of converting heritage buildings for business use has been such that demand for the space in the location outstrips supply. This has led some developers to continue with the scheme by building a new building to provide the additional accommodation to meet the demand generated by the original heritage conversion. Albion Mill is a good example.
- 2.47 The general deterioration in economic conditions in the UK since the Summer of 2007, particularly rising unemployment, pay freezes and the weaker exchange value of sterling, has encouraged more UK residents to holiday at home rather than going abroad. Much comment in the media at the current time suggests 10 years of austerity in Britain following the May 2010 election, which suggests this trend will continue or may increase. Environmental considerations and increasing delays

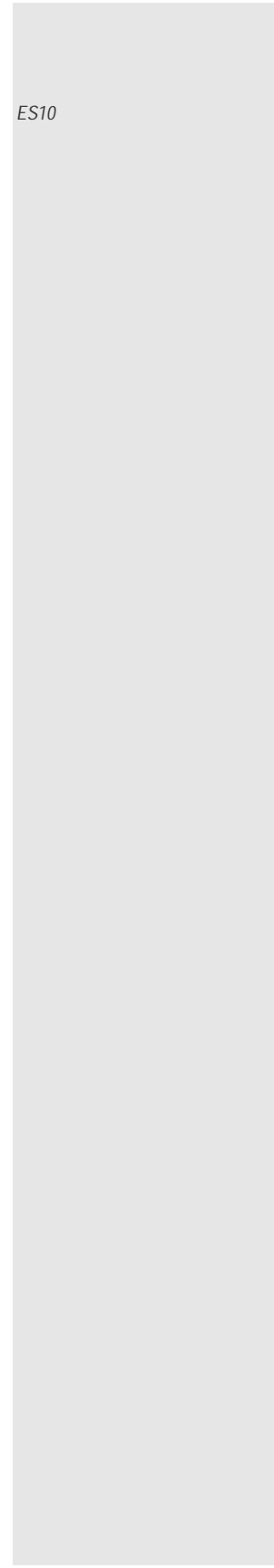
ES2, ES4, ES7, ES11

HR3

at airports due to security measures have also encouraged people to holiday at home.

- 2.48 Heritage assets have a key role to play in attracting UK holidaymakers to towns, assets and landscapes.

ES10



PART II – MEASURING THE ECONOMIC IMPACT OF HERITAGE

3. Approach and Methodology

- 3.1 Making an assessment of the economic impact of historic assets is an emerging and challenging science. This study takes account of the approaches used in previous studies together with adding rigour by using case study evidence to help prove the validity of the over-arching approach.
- 3.2 In assessing the economic value and impact of heritage, the study will follow the “Heritage Works” criteria of assessing:
- n Use value – direct and indirect
 - n Non-use values such as:
 - n Bequest value
 - n Altruistic value
 - n Existence value
 - n Economic benefits arising from heritage activity
 - n Strategic added value
 - n Wider impacts on the vitality of urban and rural areas.

Existing Research Overview

- 3.3 The existing research which is particularly relevant to this study has been reviewed and its key findings on methodology considered.

Economic Impact of the UK Heritage Tourism Economy – November 2009, Oxford Economics

- 3.4 The study examines the economic impact of heritage based tourism in the UK. The report states that a key objective of the study is to develop an indication of the gross economic impact of heritage tourism in the UK in terms of visitor numbers, visit spend, employment and GDP.
- 3.5 The approach used is a broad-based, top down approach. The study has adopted an economic impact approach and focuses on heritage-motivated tourism rather than activity based tourism. The study makes a distinction between “core” heritage-based tourism, such as visits to historic buildings, and “green spaces” tourism, such as natural heritage.
- 3.6 A key result from the study is that heritage-based tourism accounts for at least £4.3billion in GDP and 113,000 employees in the UK. If green spaces tourism is included, heritage based tourism accounts for £7.4 billion GDP and 195,000 jobs.
- 3.7 If indirect and induced effects are also allowed for, the heritage-based tourism economy is estimated to account for at least £11.9 billion in GDP and 270,000 employees. Including green spaces tourism, this accounts for 20.6 billion in GDP, 466,000 jobs.

The Economic Impact of Heritage in the North West

- 3.8 For the purposes of the study, the meaning of heritage was considered to comprise the following:
- n Built heritage
 - n Archaeology and historic landscapes
 - n Archives and collections
 - n Historic events
- 3.9 The heritage assets considered within the study were grouped into two strands:
- n townscapes – comprising clusters of historic buildings that create ‘neighbourhoods’ of distinctive character; and
 - n landmarks – comprising individual ‘stand out’ historic structures.
- 3.10 It is noted within the report that whilst there is a tendency to think about the value of heritage in relation to landmarks, townscapes also make a significant contribution.
- 3.11 The methodology used was to focus on direct and indirect use values and the impacts arising from heritage related activity. Use values were identified as:
- n Tourism and the visitor economy
 - n The management and operation of heritage assets
 - n Conservation and management activities associated with heritage
 - n Business activities that take place within a heritage setting
 - n Skills and training.
- 3.12 Non use values were limited to commercial and residential land and property prices that are related to heritage. Multiplier effects were not included within the analysis so as to ensure a focussed heritage related impact. Case studies were also used to highlight issues and inform the analysis.
- 3.13 A key result of the study was to find that approximately 39,000 jobs are supported by heritage in the North West, accounting for approximately £1,613.5 in GVA.

Heritage Counts 2009

- 3.14 Heritage Counts is an annual survey of the state of England’s historic environment. The 2009 survey also considers the contribution of the historic environment in creating a sense of ‘place’ for people, and in turn how this has a positive impact on ‘social capital’.
- 3.15 The methodology used was to explore two hypotheses:

People who live in areas where there is a higher concentration of significant historic environmental assets have a stronger sense of place and/or increased social capital.

Individuals who have an interest in the historic environment or have recently participated in the historic environment have a stronger sense of place and/or increased social capital.

- 3.16 People surveyed were asked a range of questions. A computer model was used to assess which variables had a significant relationship with sense of place and social capital.
- 3.17 The findings of the report showed that the historic environment is an important contributor to sense of place and social capital. The study also found that it is not only living in areas with high densities of historic buildings that matter, but also understanding and involvement in the local historic environment.

Impact on the Visitor Economy – Approach and Issues

- 3.18 There are, essentially, two means by which the impact of the visitor economy in a certain area can be measured.
- 3.19 The first is “top down”, measuring the overall amount of visitor spend in the area, and associated economic activity that can be attributed to it, and then making an estimate of how much of that can be attributed to heritage.
- 3.20 The second is “bottom up”, measuring the size and nature of the “heritage product” and then, from that, calculating what its impact might be.
- 3.21 As discussed below, both are difficult and there is simply no way of making these estimates with precision. The very best that they can provide is an order of magnitude.
- 3.22 “Top down” is the simplest approach, but it offers little by way of understanding of what the heritage offer is and how it works to influence the visitor economy. “Bottom up” offers considerably more insights in that respect. We have adopted both approaches in this report. This section outlines some of the main issues involved in both methods and explains the approach that we have taken.

4. Top Down Approach

Tourism impact

- 4.1 To establish the impact of tourism activity in relation to the heritage asset, the following methodology has been adopted:
- n visitor activity information was obtained from the Regional Visitor Survey (RVS);
 - n tourism volume and value information was extracted from the Cambridge Economic Model;
 - n the RVS information was applied to the Cambridge data and assumptions were made in relation to certain visitor activity categories to apply a level of cautious sensitivity;
 - n a turnover/FTE figure was applied to the total expenditure values to estimate the employment impact.

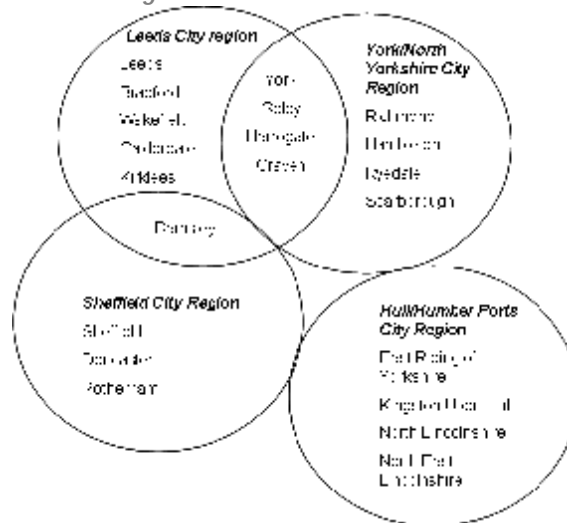
Regional Visitor Survey (RVS) Data

- 4.2 Following consultation with representatives from Welcome to Yorkshire (WTY), relevant RVS data was obtained in order to inform the top-down approach to this study. The RVS is compiled from a range of survey points across the region and asks visitors a range of questions in relation to their visit. The survey, which is funded by Yorkshire Forward and managed by tourism agency WTY, gives a true representation of visitor activity and spending habits. Key survey questions include:
- n Why did you visit Yorkshire, and any specific areas within Yorkshire?
 - n How did you get here?
 - n Where did you stay and for how long?
 - n What places did you visit?
 - n How much did you spend?
- 4.3 The study analysis focuses upon Q.20(b) of the survey which asks visitors what their main activity is during their visit. From the long list of 28 activities on the survey, **“Visiting historic houses and gardens, heritage sites (incl. castles & gardens)”** is the obvious activity which relates to the heritage asset, given the specific reference to ‘heritage’ in the title. However, a further 4 principal activities have been identified which could also be considered to represent heritage-related activity, as below:
- n Stroll around and enjoy the ambience of city/town/village
 - n Visiting natural attractions (e.g. coastline, countryside etc)
 - n Visiting cultural visitor attractions, (e.g. museums, art galleries, craft centres)
 - n Visiting canals and waterways.
- 4.4 From the RVS data, it has therefore been possible to identify the percentage of visitors whose ‘main activity’ undertaken during their visit is strongly linked to the heritage asset i.e. the primary purpose of their trip relates to heritage related activity. This data is available at the regional level and also for each local authority within the region to enable collation of the data at the functional sub-region spatial scale,

as per the requirements of the brief. The table below identifies the spatial definition of the functional sub-regions used in this study as agreed with the steering group:

- 4.5 As the table illustrates, several of the local authorities appear within more than one functional sub-region. This reflects the fact that despite being formally located within a particular functional sub-region boundary, some of the local authorities are considered to have a significant role in other functional sub-regions as well, particularly in relation to their heritage assets. For example, despite being within the LCR, York is considered to also have a significant role within the York/North Yorkshire functional sub-region (given that it is located within the North Yorkshire sub-region) and so it has been placed within both. The same applies to Selby, Harrogate and Craven, which despite being in the LCR are actually located within the North Yorkshire sub-region. Barnsley has been included as part of both the LCR and the SCR, as a formal decision has not yet been made by the functional sub-region Area partners as to where it should be positioned. The regional totals have been compiled by WTY and do not simply represent a 'rolling total' of the local authority figures and so this should negate any form of double counting at the regional level as a result of the above.

Figure 4.1 Functional Sub-region Areas



- 4.6 It is worth noting that the RVS does not provide data for local authorities such as Chesterfield Borough Council and North East Derbyshire District Council, which despite being part of the Sheffield City Region are located outside of Yorkshire & Humber and are therefore not applicable to this study. Also, there is no RVS data available for the North Lincolnshire and North East Lincolnshire Districts as surveys were not undertaken in these districts – this will be taken into account in the quantitative analysis as otherwise the data for the Hull/Humber Ports functional sub-region will be underrepresented.
- 4.7 Summary tables of the RVS data at the regional and functional sub-regional levels in relation to responses to the five main activities undertaken for both day and overnight visitors are set out below.

Figure 4.2: RVS data

The main activity undertaken – day visitors (RVS data)					
	LCR	SCR	Hull/Humber	York/N.Yorks	Region
Stroll around and enjoy the ambience of city/town/village	11.2%	2.2%	18.7%	21.9%	12.6%
Visiting natural attractions (e.g. coastline, countryside etc)	2.8%	1.2%	9.3%	11.2%	5.4%
Visiting historic houses and gardens, heritage sites (inc. castles, churches, etc)	12.3%	10.6%	15.0%	18.9%	13.3%
Visit cultural visitor attractions (e.g. art galleries and craft centres)	41.2%	42.3%	34.5%	9.5%	34.6%
Visiting canals and waterways	2.1%	0.9%	0.0%	0.7%	1.6%
Total	69.7%	57.3%	77.5%	62.2%	67.5%

Figure 4.3: RVS data

The main activity undertaken – overnight visitors (RVS data)					
	LCR	SCR	Hull/Humber	York/N.Yorks	Region
Stroll around and enjoy the ambience of city/town/village	16.8%	6.2%	23.3%	24.8%	23.3%
Visiting natural attractions (e.g. coastline, countryside etc)	4.3%	1.0%	6.1%	12.0%	9.4%
Visiting historic houses and gardens, heritage sites (inc. castles, churches, etc)	7.6%	9.9%	17.4%	13.9%	9.7%
Visit cultural visitor attractions (e.g. art galleries and craft centres)	17.8%	19.1%	21.0%	5.1%	11.1%
Visiting canals and waterways	1.8%	1.5%	0.0%	0.5%	1.1%
Total	48.1%	37.7%	67.7%	56.4%	54.6%

- 4.8 These tables identify that at the regional level, 13% of day visits and 10% of overnight visits were driven by the principal heritage category ‘visits to historic houses, gardens and heritage sites’. However, if the wider definition of heritage-related activity (i.e. the additional four activities from the survey) is included then this amounts to 68% of day visits and 55% of overnight trips being strongly linked to heritage-related activities. This data is also presented at the various Functional Sub-region Area levels.

4.9 We are then able to apply this RVS data to the 2007 Cambridge Economic Model data, as in the next section below, to establish the volume and value of this activity.

Cambridge Economic Model Data

4.10 The Cambridge Model relies upon data gathered through national visitor surveys and adopts a ‘top down’ approach to disaggregate this data down to regional and district/local authority levels. It provides information relating to the number of visitors to a defined geographic area and their associated spend split by type of visit (i.e. day/overnight/business etc). The extract below illustrates a summary of the Model for the Yorkshire and Humber region, which identifies that the total value of the tourism market to the region is c.£6.3bn.

Figure 4.4: Cambridge Model Data for the Y&H region

	Trips	Nights	Spend
Domestic Staying Visitors	9,173,000	27,400,000	£1,214,703,000
International Visitors	868,000	8,566,000	£285,683,000
Business Visitors	1,920,000	5,055,000	£432,909,000
Day Visitors	95,660,000	95,660,000	£4,366,531,000
Total	107,621,000	136,681,000	£6,299,826,000

4.11 For the purposes of this study, business tourism has been excluded from the calculations, as it is not considered that business tourism is primarily motivated by heritage. Other forms of tourism recorded separately in the Cambridge Model (study/miscellaneous etc) have also been ignored due to uncertainties over the relationship between expenditure data and travel motivations.

4.12 It is important to differentiate between both international and domestic staying visitors who visit the region for holiday purposes and those who visit the region to ‘visit friends and relatives’ (VFR). If VFR is the main reason for a visit to the region, then any subsequent heritage visit should arguably be excluded from the impact calculation, as it is incidental to the real purpose of the visit. However, evidence from other studies² has demonstrated that a substantial proportion (24%) of VFR tourists participated in heritage-related activities (from analysis of the International Passenger Survey) and that some VFR visitors describe heritage as the main motivator for their trip. It therefore seems appropriate to include a proportion of the VFR visits within the heritage-driven economic impact calculation. An extract from the Cambridge Model, showing the breakdown of spend by holiday and VFR is illustrated below, for use in calculating visits and spend at the local authority level.

² such as the 2009 Oxford Economics report on the ‘Economic impact of the UK heritage tourism economy’

Figure 4.5: Cambridge Model Data for the region – identifying the proportion of VFR visitors

	Trips	%	Nights	%	Spend	%
Total Domestic Staying Visitors (excl business & other)	8,997,000	100%	26,779,000	100%	£1,197,826,000	100%
- Holiday	6,774,000	75.3%	21,554,000	80.5%	£986,619,000	82.4%
- VFR	2,223,000	24.7%	5,225,000	19.5%	£211,207,000	17.6%
Total International Visitors (excl business & other)	790,000	100%	6,473,000	100%	£214,680,000	100%
- Holiday	307,000	38.9%	1,528,000	23.6%	74,262,000	34.6%
- VFR	483,000	61.1%	4,945,000	76.4%	140,418,000	65.4%

Applying the RVS data to the Cambridge data

4.13 The approach adopted in this study involves applying the findings of the RVS to the Cambridge Model, to quantify the tourism impact of the region’s heritage assets. This has been undertaken at the local authority level and then aggregated up to the functional sub-regional area level (regional data has been provided separately and is not simply an aggregation of the functional sub-regional area data). For each local authority, the percentage of both day and overnight visitors undertaking each of the five heritage-related activities as their ‘main activity’ from the RVS data was applied to the total number of day and overnight visitors and associated spend at the local authority level from the Cambridge data, to determine the visitor numbers and spend attributable to these five heritage related activities at the local authority level. This has been subject to a number of sensitivity adjustments, as discussed below.

Visiting Friends and Relatives (VFR)

4.14 In terms of VFR, the full proportions of visitors motivated by heritage as per the RVS have therefore been applied to staying ‘holiday’ visitors (both domestic and international) but the following assumptions have been made in relation to staying VFR tourists³:

- n International VFR tourists – 40% of the RVS proportion assumed to be motivated by heritage in relation to visitor trips;
- n Domestic VFR tourists – 25% of the RVS proportion assumed to be motivated by heritage in relation to visitor trips.

4.15 Furthermore, the visitor spend motivated by heritage that is attributed to VFR tourists is assumed to be less than that of holidaying visitors given that visitors are unlikely to be paying for accommodation and

³ in line with the assumptions made in the 2009 Oxford Economics report on the importance of heritage to the national economy

other costs relating to everyday subsistence. The following prudent assumptions have therefore been made in relation to visitor spend:

- n International VFR tourists – 25% of the RVS proportion assumed to be motivated by heritage in relation to visitor spend;
- n Domestic VFR tourists – 10% of the RVS proportion assumed to be motivated by heritage in relation to visitor spend.

Attributing 'heritage'

4.16 A further attribution process considers the appropriateness of assuming that all of the five main reasons for visiting the region identified above are 100% heritage related. A cautious approach has been adopted to limit any over-representation of the importance of heritage and the prudent assumptions behind this are set out in the table below:

Figure 4.6: Attributions of heritage related activity

Main activity undertaken as per the RVS	Proportion of visitor numbers and spend included	Rationale/assumption
Stroll around and enjoy the ambience of city / town / village	80%	Heritage is a key driver of the ambience of a 'place'. It is difficult to imagine examples of where this main activity is not in a heritage townscape and therefore strongly linked to the heritage asset, although isolated examples may exist.
Visiting natural attractions (e.g. coastline, countryside, etc.)	75%	Activities such as walking, cycling, fishing, wildlife watching and cycling (which are undertaken in natural environments) are recognised separately within the RVS. The assumption is therefore that the remainder are motivated by the natural 'heritage' of our coastlines and countryside, which in Yorkshire & Humber are also working landscapes and can be considered natural heritage related assets.
Visiting historic houses and gardens, heritage sites	100%	Specifically referencing 'heritage', this is the key heritage-related activity and 100% has therefore been attributed.
Visit cultural visitor attractions e.g. museums, art galleries, craft centres	30%	Assumption is that all museums and a proportion of art galleries may be heritage related, but modern art galleries in contemporary buildings and craft centres may not be heritage related at all.
Visiting canals and waterways	50%	Canals are an obvious heritage asset but visits to waterways can not be attributed to heritage.

5. Bottom Up Approach

Step 1: Identifying “Landmarks” and “Townscapes”

- 5.1 There are two primary means by which heritage has impact on the economy.
- 5.2 First, there is the impact of individual buildings and sites, especially those that have a degree of prominence. People are often attracted to heritage sites as destinations in their own right. They make trips to see churches, museums, archaeological sites. They might travel a long distance to do so. From a non-tourism perspective, organisations often occupy such sites for reasons such as prestige or because they like the character.
- 5.3 We call historic sites that are destinations in their own right *heritage landmarks*.
- 5.4 Secondly, people can be attracted to places which have clusters of historic buildings and/or a sense of place that is determined by the past, in some cases the historic street pattern. They are typically designated as Conservation Areas. We call these *heritage townscapes*.
- 5.5 Sometimes people go to look at the old buildings in these areas, but often they simply form a backdrop to activity.

Step 2: Measuring the impact of landmarks and townscapes

- 5.6 A proportion of heritage landmarks are managed as attractions, and they collate visitor numbers which, in turn, are collated by Welcome to Yorkshire on behalf of Visit Britain, the national tourism agency, which issues an annual report called Visits to Visitor Attractions. Locum has a database of the data from these reports.
- 5.7 That data has been used as the foundation of our bottom-up estimate of how many visits there are to heritage landmark attractions.

Heritage in Yorkshire and the Humber

Heritage orientated visitor offer in Yorkshire

- 5.8 Three primary sources have been used to build a picture of the heritage offer to visitors in Yorkshire: Blue Guide England, the Good Pub Guide and the Good Hotel Guide.

Blue Guide Analysis

- 5.9 The aim of this section is to develop a picture of the size and nature of the heritage offer in Yorkshire, especially in so far as it is likely to have impact on the visitor economy.

- 5.10 The primary source of data for the analysis is the Blue Guide England⁴. The Blue Guide series, which covers most European countries, is considerably the most detailed and authoritative general visitor guide and is especially strong on heritage and culture. It identifies almost every individual building or site that is likely to be of interest to any tourist. The 11th edition, published in 1995, has been used because it is the last available. Its age makes relatively little difference because interesting heritage, by its nature, only changes slowly over time. The main area in which an up to date edition would most differ from the 1995 edition is Museums – the 1995 edition does not include, for example, the Royal Armouries and the Thackray Museum in Leeds, and some museums that it does include will have closed in the interim. It is also likely that some townscape areas that have been regenerated in the interim would feature in an up to date edition of the Blue Guide. The Blue Guide is considerably less useful for identifying townscapes than landmarks, but it does give a clue to the importance of them.
- 5.11 An advantage of using the Blue Guide is that it is entirely independent. Either something is featured or it is not. We have applied no judgement in the matter.
- 5.12 About 515 heritage sites (excluding museums and galleries) are highlighted altogether by the Blue Guide, about 450 of them being “landmarks” (i.e. single sites) and about 65 of them being “townscapes”. North Yorkshire⁵ dominates in terms of the number of identified attractions, with more than half of the regional total. West Yorkshire has a quarter of the total.

Figure 5.1

Heritage attractions listed in the Blue Guide to England					
	Hull and Humber Ports	Leeds City Region	Sheffield City Region	Yorks and North Yorks	Total
Landmarks	62	200	43	277	582
% of regional total	11%	34%	7%	48%	100%
Townscapes	8	23	1	20	63
% of regional total	13%	37%	2%	32%	100%
Total	70	223	44	297	645
% of regional total	11%	35%	7%	46%	100%

⁴ The series was started in 1918 by the Scottish brothers James and Findlay Muirhead who had, until the outbreak of World War 1, been the English language editors of the famous German Baedeker series. The first edition of the Blue Guide England appeared in 1920. The series is now owned by small publishing house, Somerset Books, which, unfortunately, does not appear to have the resource to produce new editions of the main guides (it does periodically add new editions).

⁵ For the purposes of this analysis, the rural areas to the north of Leeds that are considered part of the Leeds Sub-regional Functional Area, including Harrogate, are included in North Yorkshire. Blue Guide England described destinations on the basis of “routes”, with diversions from them, making it very difficult to allocated places between sub regions. It is inevitable, therefore, that some places will be misallocated. This is not likely to make any significant difference in the big picture, however.

5.13 York has considerably more than any other town or city. Hull's strong second place position is perhaps the biggest variation from conventional image.

Figure 5.2

Number of heritage attraction identified by the Blue Guide by city/town	
Town/City	Attractions
York	48
Hull	25
Leeds	21
Scarborough	20
Sheffield	13
Bradford	13
Whitby	10
Ripon	10
Richmond	10
Wakefield	10
Halifax	9
Beverley	8
Knaresborough	8
Doncaster	6
Harrogate	5
Haworth	5
Grimsby	4
Rotherham	4
Skipton	4

5.14 The landmarks have been grouped into 13 categories (in addition, there are two categories of townscapes – sections of cities and towns, and villages).

Figure 5.3: Categorisation of landmarks

Categorisation of landmarks highlighted in Blue Guide England										
	Hull and Humber Ports		Leeds City Region		Sheffield City Region		Yorks and North Yorks		Total	
	Number	%	Number	%	Number	%	Number	%	Number	%
Battlefield	0	0%	0	0%	0	0%	3	1%	3	1%
Cathedral	0	0%	5	3%	1	3%	2	1%	8	2%
Church	24	40%	53	27%	12	35%	67	30%	156	31%
Country House	2	3%	14	7%	1	3%	20	9%	37	7%
Event	1	2%	8	4%	1	3%	8	4%	18	4%
Gardens	0	0%	2	1%		0%	3	1%	5	1%
Industrial	0	0%	7	4%	3	9%	0	0%	10	2%
Monument	7	12%	3	2%	1	3%	9	4%	20	4%
Park	0	0%	6	3%	2	6%	10	5%	18	4%
Remains	4	7%	23	12%	3	9%	44	20%	74	15%

Secular – rural	1	2%	19	10%	3	9%	22	10%	45	9%
Secular - Urban	19	31%	52	27%	7	21%	31	14%	109	21%
Transport	3	5%	1	1%		0%	3	1%	7	1%
Total	61	100%	193	100%	34	100%	222	100%	510	100%

Figure 5.4: Categorisation of townscapes

Categorisation of townscapes highlighted in Blue Guide England										
Townscape	Hull and Humber Ports		Leeds City Region		Sheffield City Region		Yorks and North Yorks		Total	
	Number	%	Number	%	Number	%	Number	%	Number	%
Townscape	6	75%	1	100%	21	91%	25	56%	53	69%
Village	2	25%	0	0%	2	9%	20	44%	24	31%
Total	8	100%	1	100%	23	100%	45	100%	77	100%

The Good Pub Guide & Good Hotel Guide

- 5.15 There are other forms of heritage landmark that are major destinations in addition to those featured in the Blue Guide, notably pubs, restaurants and hotels.
- 5.16 As mentioned in the discussion about townscapes above, restaurants, bars and clubs often locate in heritage townscapes. Major pub chains like Wetherspoons have made a feature of converting interesting old buildings.
- 5.17 More traditional pubs are, in many cases, form the main eating out destinations in rural areas. The Good Pub Guide provides an independent assessment of the best pubs. Most of them have a high rating because of the quality of the food offer.
- 5.18 Every one of the Yorkshire’s 75 entries in the Good Pub Guide is a historic property. About three quarters of them are in North Yorkshire, and the abundance of high quality pubs there is one of its main assets as a destination. There is a full listing of the entries in Appendix 2.

Figure 5.5: Entries in Good Pub Guide

Number of Entries in the Good Pub Guide		
	No of entries	% of Region
Hull and Humber Ports	5	6
Leeds City Region	18	22
Sheffield City Region	3	4
Yorks and North Yorks	55	68
Total	81	100

6. Quantitative Assessment

Top Down Findings

Visitor Numbers Analysis

- 6.1 The summary table below identifies the outcomes of applying the findings of the RVS to the Cambridge data at the functional sub-region Areas and regional levels in terms of visitor numbers, split by day and overnight visitors and incorporating the above assumptions.

Figure 6.1: Visitor Numbers

Visitor Numbers by Functional sub-region areas					
Day visitors - numbers	LCR	SCR	Hull/Humber	York/N.Yorks	Region
Stroll around and enjoy the ambience of city/town/village	4,085,017	479,709	1,846,084	3,536,895	9,642,528
Visiting natural attractions (e.g. coastline, countryside etc)	751,254	242,821	958,430	1,651,949	3,874,230
Visiting historic houses and gardens, heritage sites (inc. castles, churches, etc)	4,742,449	1,949,879	2,083,133	3,892,624	12,722,780
Visit cultural visitor attractions (e.g. art galleries and craft centres)	7,779,746	2,073,548	707,450	594,888	9,929,508
Visiting canals and waterways	805,623	91,107	-	65,863	765,280
Total	18,164,088	4,837,663	5,595,098	9,742,219	36,934,326
Overnight visitors - numbers	LCR	SCR	Hull/Humber	York/N.Yorks	Region
Stroll around and enjoy the ambience of city/town/village	622,730	80,190	128,112	823,161	1,647,878
Visiting natural attractions (e.g. coastline, countryside etc)	115,853	12,623	36,336	345,411	552,011
Visiting historic houses and gardens, heritage sites (inc. castles, churches, etc)	294,732	120,776	114,013	394,599	759,505
Visit cultural visitor attractions (e.g. art galleries and craft centres)	199,278	59,535	21,652	72,351	260,737
Visiting canals and waterways	32,737	15,239	-	5,965	43,065
Total	1,265,330	288,363	330,112	1,639,486	3,263,197
Total day and over night visitors	LCR	SCR	Hull/Humber	York/N.Yorks	Region
Stroll around and enjoy	4,707,747	559,899	1,974,196	4,360,056	11,290,406

the ambience of city/town/village					
Visiting natural attractions (e.g. coastline, countryside etc)	867,107	255,444	994,766	1,997,360	4,426,241
Visiting historic houses and gardens, heritage sites (inc. castles, churches, etc)	5,037,181	2,070,655	2,227,146	4,285,223	13,482,285
Visit cultural visitor attractions (e.g. art galleries and craft centres)	7,979,023	2,133,083	729,102	667,239	10,190,245
Visiting canals and waterways	838,360	106,945	-	71,828	808,345
Total	19,429,418	5,126,026	5,925,210	11,381,705	40,197,523

* Data at the regional level does not equate to the sum of the functional sub-region data given that some local authorities are represented in more than one functional sub-region, and so the regional data has been compiled separately.

6.2 This demonstrates that at the regional level, if the percentage of day and overnight visits motivated by “visiting historic houses, gardens and heritage sites” as per the RVS is applied to this Cambridge data, this equates to the following:

- n 12m day visitors came to the region with this being the main reason for their trip
- n 0.7m staying visitors came to the region with this being the main reason for their trip

6.3 However if the definition of heritage is considered more broadly to include the other four heritage-related activities from the RVS as well and applied to the Cambridge data, at the regional level this equates to the following:

- n 37m day visitors came to the region with a heritage-related activity being the main reason for their trip
- n 3m staying visitors came to the region with this being the main reason for their trip.

Visitor Spend Analysis

6.4 The summary table below identifies the outcomes of applying the findings of the RVS to the Cambridge data at the Functional sub-regional Areas and regional levels in terms of visitor spend, split by day and overnight visitors and incorporating the above assumptions:

Table 6.2: Visitor Spend

Visitor Spend by functional sub-region					
Day visitors – spend (£)	LCR	SCR	Hull/Humber	York/N.Yorks	Region
Stroll around and enjoy the ambience of city/town/village	185,408,518	23,076,570	80,711,084	142,662,218	440,146,325
Visiting natural attractions (e.g. coastline, countryside etc)	30,959,004	11,681,639	41,291,017	64,348,298	179,844,506

Visiting historic houses and gardens, heritage sites (inc. castles, churches, etc)	202,966,737	92,094,180	89,583,091	151,949,309	580,748,623
Visit cultural visitor attractions (e.g. art galleries and craft centres)	372,883,040	98,471,797	34,496,885	26,391,782	453,245,918
Visiting canals and waterways	38,539,578	4,352,502	-	2,576,367	34,932,248
Total	830,756,877	229,676,688	246,082,077	387,927,972	1,654,902,369
Overnight visitors – spend (£)	LCR	SCR	Hull/Humber	York/N.Yorks	Region
Stroll around and enjoy the ambience of city/town/village	100,249,750	7,966,252	16,699,056	141,740,135	253,795,759
Visiting natural attractions (e.g. coastline, countryside etc)	18,421,468	1,263,725	4,781,389	59,564,371	78,755,987
Visiting historic houses and gardens, heritage sites (inc. castles, churches, etc)	47,659,103	11,283,214	19,000,080	64,588,422	108,359,301
Visit cultural visitor attractions (e.g. art galleries and craft centres)	28,637,638	5,572,620	2,623,492	12,601,427	37,199,636
Visiting canals and waterways	4,499,563	1,532,715	-	923,505	6,144,084
Total	199,467,521	27,618,526	43,104,018	279,417,861	484,254,768
Total day and over night spend (£)	LCR	SCR	Hull/Humber	York/N.Yorks	Region
Stroll around and enjoy the ambience of city/town/village	285,658,268	31,042,823	97,410,140	284,402,353	693,942,084
Visiting natural attractions (e.g. coastline, countryside etc)	49,380,472	12,945,364	46,081,406	123,912,669	225,600,493
Visiting historic houses and gardens, heritage sites (inc. castles, churches, etc)	250,625,840	103,377,394	108,583,171	216,537,731	689,107,924
Visit cultural visitor attractions (e.g. art galleries and craft centres)	401,520,678	104,044,416	37,120,377	3,499,871	41,076,332
Visiting canals and waterways	43,039,141	5,885,217	-	3,499,871	41,076,332
Total	1,030,224,398	257,295,214	289,186,095	667,345,834	2,170,172,387

* Data at the regional level does not equate to the sum of the functional sub-region data given that some local authorities are represented in more than one functional sub-region, and so the regional data has been compiled separately.

- 6.5 Assuming that those people visiting heritage attractions have a similar level of spend to other visitors (which the RVS implies) it can be estimated that based upon those primarily coming to visit “historic houses, gardens and heritage sites”, that **heritage tourism is directly responsible for generating in excess of £600m of visitor expenditure annually at the regional level. Based on a turnover/FTE figure of £49,429⁶, this would equate to c.12,000 jobs, which represents approximately 0.5% of total regional employment⁷.**
- 6.6 However, if the definition of heritage is considered more broadly to include the other four heritage-related activities from the RVS as well and again assuming that those people visiting heritage attractions have a similar level of spend to other visitors (which the RVS implies) we are able to estimate that based upon those primarily coming to visit the region to partake in one of the five heritage-related activities (68% for day and 55% for staying), that **heritage tourism in its broader definition is directly responsible for generating in excess of £2.1bn of visitor expenditure annually at the regional level. This equates to c.45,000 jobs based upon a turnover per FTE figure, which represents approximately 2% of total regional employment⁸.**
- 6.7 The above figures relate to spend by ‘all visitors’, irrespective of their origin. To understand the ‘net additional’ position to the region, reference can be made to the UK Tourism Survey (2007). This identifies a total of 10.35m trips to the Yorkshire & Humber region, of which 6.6m were from outside of the region. Applying this to the above figures could equate to heritage being responsible for in excess of £440m of additional visitor expenditure to the region based upon the definition of heritage in its narrowest form or in excess of £1.4bn if heritage is considered in its wider form. This could equate to circa 9,000 FTE jobs based upon the narrow definition of heritage and circa 28,000 FTE jobs based upon the wider definition.

Management and Operational Impact

- 6.8 In addition to the employment impact generated by tourism spend associated with the heritage asset, there is also a direct level of employment which relates to the management and operation of the heritage buildings and townscapes. This is clearly a broad mix of places and facilities but its scale can be estimated through an analysis the numbers of businesses and levels of employment associated with particular heritage ‘sectors’ in the region. This has been undertaken through a detailed review of 2007 Standard Industrial Classification (SIC) data at the 4 digit level via the Annual Business Inquiry (ABI) for employment related to the following:

- n library and archive activities;
- n museum activities;

⁶ This turnover per FTE figure has been estimated from the BIS SME Statistics (2008). This provides total turnover and employment figures for industry sections in the Yorkshire and Humber region. By dividing total turnover in the region by total employment in the region for the tourism-related ‘Hotels and Restaurants’ section, this provides a turnover per FTE figure of £49,429.

⁷ Based on 2007 ABI data which identifies a total of 2,237,952 employees in the region

⁸ Based on 2007 ABI data which identifies a total of 2,237,952 employees in the region

n operation of historical sites.

6.9 This data was obtained at both the local authority and regional levels to enable an analysis at the Functional sub-region Area level to be developed from this. It has been prudently assumed that only 10% of library and archive activities can be considered to be heritage-related, as illustrated in the table below:

Figure 6.3: Relevant 2007 SIC codes in relation to heritage

Sector	SIC Code and description	Proportion of code taken
Library & Archive Activities	9101	10%
Museum Activities ⁹	9102	100%
Operation of historical sites & buildings	9103	100%

6.10 From the analysis of the ABI data it was possible to derive estimates of employment and numbers of businesses relating to the operation of historical sites/buildings, libraries and museums. However, heritage in the region is considered to include a wider definition, such as parks/gardens and cathedrals/ministers and these are not clearly referred to in the ABI data. An alternative 'bottom-up' approach has been applied to derive management and operational employment estimates related to such, as below:

n *Parks/gardens* – the number of parks and gardens in the Yorkshire & Humber region was obtained from the 2009 Heritage Counts Survey which identifies that there are 117 registered parks and gardens. From an analysis of the 2009 VisitBritain 'Survey of Visits to Visitor Attractions', it was then established that there are an average of 15.9 FTE employees per garden nationally. Applying this to the 117 registered parks and gardens in the region equates to 1,860 FTE employees in this sector regionally;

n *Cathedrals/minsters* – from an analysis of the region, it was estimated that there are approximately 12 cathedrals and minsters within Yorkshire & Humber¹⁰. From an analysis of the 2009 VisitBritain 'Survey of Visits to Visitor Attractions', it was then established that there are an average of 5.2 FTE employees per place of worship nationally. This will be too low a figure to adopt for the main cathedrals and minsters across the region (for example York Minster employs circa 200 people). It has therefore been assumed that an average of 30 FTE jobs are provided within the region's cathedrals and minsters. Applying this to the estimated 12 cathedrals and minsters in the region equates to 360 FTE employees in this sector regionally.

6.11 Table 6.4 below summarises the above to identify the estimated total number of businesses and associated employees that are directly

⁹ 100% of museum activities assumed as the SIC code wholly relates to museum activities which are considered to be wholly related to heritage activities. Only 30% of this category was assumed re the RVS survey as the museum element was amalgamated with art galleries and craft centres which are not assumed to be 100% heritage related activities.

¹⁰ Considered to include the following: Cathedral and Parish Church of St Peter, Bradford; Cathedral Church of St Peter and St Wilfrid, Ripon; Cathedral of St Peter and St Paul, Sheffield; Cathedral and Metropolitan Church of St Peter, York (York Minster); Cathedral Church of All Saints, Northgate, Wakefield; St Anne's Cathedral, Leeds; Beverley Minster; Howden (St Peter & St Paul) Minster; Halifax Minster; Doncaster (St George) Minster; Dewsbury Minster; Rotherham Minster.

involved with the management and operation of heritage assets in the region¹¹:

Figure 6.4: Management and Operational Impacts

Management and operational impacts – businesses and employees												
	9101: Library and Archive Activities		9102: Museum Activities		9103: Operation of historical sites and buildings and similar visitor attractions		Parks and Gardens		Cathedrals and Minsters		Total	
	Businesses	Employees (FTE)	Businesses	Employees (FTE)	Businesses	Employees (FTE)	Businesses	Employees (FTE)	Businesses	Employees (FTE)	Businesses	Employees (FTE)
LCR	17	329	63	1,405	29	279	23	355	7	210	138	2,588
SCR	8	86	6	144	8	115	23	365	3	90	48	801
York/North Yorks	6	76	30	474	38	462	35	557	2	60	111	1,629
Hull/Humber Ports	6	27	15	183	7	27	35	557	2	60	65	854
Region	35	481	94	1,797	64	700	117	1860	12	360	322	5,198

* Data at the regional level does not equate to the sum of the functional sub-region data given that some local authorities are represented in more than one functional sub-region, and so the regional data has been compiled separately.

This identifies that the management and operation of heritage related assets in the region directly provides in the region of 5,000 FTE jobs through circa 300 employers, which represents circa 0.2% of total regional employment in the region¹².

ES2, ES5, ES7, ES11 QLE1

6.12 There is a risk of double-counting in relation to the tourism impact set out previously. For example, a proportion of the c.45,000 jobs referred to previously, driven by visitor spend, will include some levels of employment in attractions, cafes, restaurants and potentially accommodation establishments which may also be captured in the employment analysis of the SIC code and parks/gardens/cathedrals/minsters data set out above. It is very difficult to establish this proportion without extensive survey work, so we have utilised data from the Castle Howard case study to provide a proxy. In this example, approximately 50% of the 52 FTEs are employed in roles directly associated with visitor spend. This proportion has therefore been adopted to provide an allowance for double counting and the

¹¹ Data at the regional level does not equate to the sum of the Sub-regional Functional Area data given that some local authorities are represented in more than one Sub-regional Functional Area, and so the regional data has been compiled separately. Also, the city-regional locations of the 117 parks and gardens in the region is unknown and therefore an assumption has been made regarding business and employment data at the Sub-regional Functional Area level in relation to this which assumes a higher proportion of parks and gardens in the York/North Yorkshire and Hull/Humber Ports Sub-regional Functional Areas.

¹² Based on 2007 ABI data which identifies a total of 2,237,952 employees in the region

summary table below identifies the impact of such at the functional sub-region Area and regional spatial levels:

Figure 6.5: Adjusted management and operational impacts

Area	Total (50%) adjusted FTE employees in management & operation of heritage assets
LCR	1,294
SCR	400
York/North Yorks	814
Hull/Humber Ports	427
Region	2,599

This identifies that the management and operation of heritage related assets in the region could provide in excess of 2,000 FTE jobs, once the possibility of double-counting has been accounted for.

Conservation and Maintenance Impact

- 6.13 The conservation and maintenance of heritage assets requires the involvement of a wide range of skill sets from traditional building craft skills to general construction workers to providers of professional services relating to architecture, planning, surveying and engineering. In addition to this, there are a significant number of conservation officers and specialists employed by both public and private sector organisations across the region.
- 6.14 In terms of manual craftspeople, the ‘Traditional Buildings Craft Skills’ report (National Heritage Training Group (NHTG), 2008) estimated that there were 2,343 traditional building craftspeople in the region. However, these specialist businesses will only represent a proportion of those involved in heritage-related conservation and maintenance activities. Other, more general professions and construction businesses will be involved in the conservation and maintenance of heritage assets where requirements are of a more general nature.
- 6.15 A Survey undertaken by the National Heritage Training Group (NHTG) of 1,271 building contractors identified that 533 (42%) had undertaken work on pre-1919 buildings in the past 12 months. The survey also identified that for those ‘general building’ contractors which had worked on pre-1919 buildings in the past year, that this type of work made up an average of 18% of their workload, compared with 75% for specialist heritage contractors. It has been assumed that these proportions can be applied to the Yorkshire & Humber region and this identifies that of the 125,675 employed regionally within the construction sector (ABI, 2007), 9,501 jobs are estimated to directly relate to the conservation and maintenance of heritage assets.
- 6.16 A detailed review of SIC codes at the 4 digit level from ABI data sources enables estimates to be derived of the level of professional services employment that is supported by the conservation and maintenance of heritage assets in the region. SIC codes 7111 – ‘Architectural services’ and 7112 – ‘Engineering activities and related technical consultancy’ are considered to be wholly relevant to such and this data was obtained at the local authority and regional levels. However, it would not appropriate to attribute all of such employment to

the conservation and maintenance of heritage assets. The 'Built Heritage Sector Professionals – Current Skills, Future Training' report (NHTG, 2008) identifies that at the national level, 43% of work undertaken by architectural professionals and 23% of work undertaken by engineering professionals in the year related to pre-1919 projects. These percentages were then applied to the ABI data to estimate the employment levels attributable to the conservation and maintenance of heritage assets in the region.

6.17 The table below outlines the results of this¹³:

Figure 6.6: Conservation and Maintenance Impacts

Conservation and maintenance impacts - employees						
	43% of Architectural Services jobs (SIC 7111)	23% of Engineering activities and related technical consultancy jobs (SIC 7112)	Total 'professional services' employment relating to heritage maintenance	Total number of general construction jobs relating to pre 1919 construction work	Total number of specialist manual craftspeople jobs	Total number of conservation and maintenance jobs
LCR	1,173	3,592	4,765	5,121	585	10,471
SCR	319	893	1,212	2,617	585	4,414
York/North Yorks	433	1,148	2,581	1,426	585	3,592
Hull/Humber Ports	144	544	689	1,551	585	2,825
Region	1,725	5,095	6,821	9,501	2,343	18,665

* Data at the regional level does not equate to the sum of the functional sub-region data given that some local authorities are represented in more than one functional sub-region, and so the regional data has been compiled separately.

6.18 **This identifies that the conservation and maintenance of heritage assets in the region directly supports circa 18,000 FTE jobs, which represents approximately 0.8% of regional employment¹⁴.** This does not take account of specialist conservation officers employed in the region and also other trades such as archaeology, the figures for which have not been identified and so the actual employment impact is likely to be greater than this.

ES7

Top - Down summary

6.19 Table 5.7 below presents a summary of the top down approach, which **identifies that heritage could support in excess of 60,000 FTE jobs at the regional level¹⁵** which represents approximately 2.6% of total employment in the region¹⁶.

¹³ Data at the regional level does not equate to the sum of the Sub-regional Functional Area data given that some local authorities are represented in more than one Sub-regional Functional Area, and so the regional data has been compiled separately. Also, the number of manual craftspeople jobs at the Sub-regional Functional Area level is unknown and so the total has been evenly attributed across the four Sub-regional Functional Areas for the purpose of this analysis.

¹⁴ Based on 2007 ABI data which identifies a total of 2,237,952 employees in the region

¹⁵ Assumes the broadest definition of heritage regarding the RVS data

¹⁶ Based on 2007 ABI data which identifies a total of 2,237,952 employees in the region

Figure 6.7: Summary of top down impacts

Employment impact				
	Tourism impact (FTE jobs)	Adjusted management & operational impact (FTE jobs)	Conservation & maintenance impact (FTE jobs)	Total impact (FTE jobs) ¹⁷
LCR	20,843	1,294	10,471	32,608
SCR	5,205	400	4,414	10,019
York/North Yorks	13,501	814	3,592	17,907
Hull/Humber Ports	5,581	427	2,825	8,833
Region	43,905	2,599	18,665	65,169

* Data at the regional level does not equate to the sum of the functional sub-region data given that some local authorities are represented in more than one functional sub-region, and so the regional data has been compiled separately.

6.20 Gross Value Added (GVA) is often used as a key economic performance indicator and the employment impacts generated by the heritage asset in the region could have significant regional GVA impacts. GVA per employee data was therefore obtained at the regional level and applied to the employment impacts identified above, to derive an estimated GVA impact, as outlined below¹⁸:

- n **Tourism impact** – it is assumed that the vast majority of these jobs will be within the tourism sector. The total regional GVA for the ‘Hotels & Restaurants’ sector in 2007 was £2,209m¹⁹, which, if divided by the total number of employees in the region in this sector²⁰ in 2007 of 136,288²¹, equates to an average GVA per employee of £16,803. Multiplied by 43,905 jobs as per the above table, **equates to a GVA impact of circa £700m per annum.**
- n **Management and operational impact** – it is assumed that the majority of these jobs will be tourism related as above, but is assumed that 10% of the jobs will be higher value management/finance related positions. As such, based upon the same assumptions as above, 90% of the 2,599 jobs equates to a GVA impact of circa £40m. For the 10% management/finance related jobs, the total regional GVA for the financial intermediation sector in 2007 was £5,939m, which, if divided by the total number of employees in the region in this sector in 2007 of 90,773, equates to an average GVA per employee of £65,427. Multiplied by 10% of the 2,599 jobs (245 jobs) as per the above table, equates to a GVA impact of circa £17m. **The total GVA impact related to the management and operational impact could therefore be circa £50m per annum.**
- n **Conservation and maintenance impact** – based upon the breakdown in figure 6.6 it has assumed that approximately two-thirds of these jobs will be construction related and that one third of the jobs will be higher value

¹⁷ Regional total differs from the sum of Sub-regional Functional Area totals given that some local authority areas have been included within more than one Sub-regional Functional Area area.

¹⁸ GVA by sector data at the regional level can only be obtained for a select range of industrial sectors as per the SIC and assumptions have been made in relation to these as explained

¹⁹ Office for National Statistics, 2007

²⁰ Sector as per ABI is actually ‘Accommodation and food service activities’

²¹ Annual Business Inquiry (employee analysis) 2007

professional services jobs related to architectural, planning, engineering and surveying services. The available data does not relate directly to such sectors and so the 'financial intermediation' sector has been applied to the one third as above. If it is assumed that 66% of the 18,665 jobs relate to construction activities, this equates to a GVA impact of circa £600m²². Applying 33% of the 18,664 jobs to the 'financial intermediation' sector results in a GVA impact of circa £400m. ***The total GVA impact related to the conservation and maintenance impact could therefore be circa £1 billion per annum.***

- 6.21 ***The GVA impact of the region's heritage assets could therefore be circa £1.7 billion per annum, based upon the employment impacts identified within this report, which equates to approximately 10% of total regional GVA²³.***
- 6.22 ***If a wider definition of the region's heritage is utilised, the tourism impact increases significantly, and the overall GVA impact could be circa £3.1 billion per annum, based upon the employment impacts, which is in excess of 15% of total regional GVA.***

Bottom Up Findings

- 6.23 A proportion of heritage landmarks are managed as attractions, and they collate visitor numbers which, in turn, are collated by Welcome to Yorkshire on behalf of Visit Britain, the national tourism agency, which issues an annual report called Visits to Visitor Attractions. Locum has a database of the data from these reports.
- 6.24 *That data has been used as the foundation of our bottom-up estimate of how many visits there are to heritage landmark attractions.*
- 6.25 Even that is not straightforward, however. First, visitor numbers tend to be reasonably reliable for attractions that have ticketed entry, but not for those which have free entry. Most heritage attractions are free entry. Some of them, like historic parks, have very large visitor numbers, albeit generally locals form the majority, and some of them are visited by people but only to look at them from the outside.
- 6.26 The attractions that appear in the database are listed in Appendix 2. It identifies 51 paid for attractions which report c.3.9 million annual visits in total, and 24 free attractions which report c. 1 million visits per annum. These 75 attractions for which data is available represent less than 15% of the heritage assets referenced in the Blue Guide, which itself represents a "tight" definition of heritage. Whilst these are likely to be the biggest attractions, it would be reasonable to assume that this visitor number figure of 4.9 million visitors would be significantly increased if visitor information was available for a greater proportion of the heritage assets in the region.
- 6.27 A reasonable assumption is that these 15% of attractions account for 1/3rd of total visitor numbers to the heritage asset, reflecting the fact that many heritage assets are free to enter and can attract large numbers of "free visitors" – particularly the natural heritage assets such

²² Based upon a total regional GVA in the construction sector of £6,380m (ONS, 2007) and 125,675 employees in the sector (ABI, 2007)

²³ Based upon 2007 ONS data which identifies a regional GVA figure of £16,670m per annum.

as the national parks. This would imply a total visitor number of circa 14.5 million. This broadly correlates to visitor numbers established using the top down approach.

6.28 There are other forms of heritage destination that are not “attractions” in the conventional sense, notably historic pubs and hotels. There is not scientific manner of determining what a “historic” pub or hotel is (the Radisson Blu hotel in Leeds, for example, is from a converted historic building and that adds to its character, but many of the other hotels in the same group are in modern buildings and there is no evidence that they are less successful as a result of that) or whether a pub or hotel is a destination. In the next section we have simply looked at entries in the Good Pub and Good Hotel Guides because being in them is a good indication of destination status and almost all of the Yorkshire entries are historic buildings – in these cases, the heritage of the building is clearly a central part of their appeal.

6.29 The table below summarises the heritage landmarks which have been identified from these three sources.

Figure 6.8: Heritage Landmarks

Summary of Heritage Landmarks					
	Hull and Humber Ports	Leeds City Region	Sheffield City Region	Yorks and North Yorks	Total
Battlefield	0	0	0	3	3
Cathedral	0	5	1	2	8
Church	24	53	12	67	156
Country House	2	14	1	20	37
event	1	8	1	8	18
Gardens	0	2	0	3	5
Industrial	0	7	3	0	10
Monument	7	3	1	9	20
Park	0	6	2	10	18
Remains	4	23	3	44	74
Secular – Rural	1	19	3	22	45
Secular – Urban	18	52	7	31	108
Transport	3	1	0	3	7
Destination Pubs	5	18	3	55	81
Destination Hotels	0	5	0	19	24
Total	65	216	37	296	544

** Data at the regional level does not equate to the sum of the functional sub-region data given that some local authorities are represented in more than one functional sub-region, and so the regional data has been compiled separately.*

Sources: Blue Guide England, Good Hotel Guide, Good Pub Guide

6.30 The table below provides an order of magnitude estimate of the number of full time equivalent jobs that these sites might support through a combination of direct employment and indirect effects (i.e. employment in suppliers).

Figure 6.9: Employment Associated with Heritage Landmarks

Full time employment associated with heritage landmarks						
	Estimated FTE's per landmark	Hull and Humber Ports	Leeds City Region	Sheffield City Region	Yorks and North Yorks	Total
Battlefield	4	0	0	0	3	12
Cathedral	45	0	5	1	2	360
Church	3	24	53	12	67	468
Country House	20	2	14	1	20	740
Event	5	1	8	1	8	90
Gardens	25	0	2	0	3	125
Industrial	8	0	7	3	0	80
Monument	2	7	3	1	9	40
Park	8	0	6	2	10	144
Remains	15	4	23	3	44	1110
Secular – Rural	10	1	19	3	22	450
Secular – Urban	10	18	52	7	31	1080
Transport	8	3	1	0	3	56
Destination Pubs	8	5	18	3	55	648
Destination Hotels	20	0	5	0	19	480
Total	-	65	216	37	296	5883

- 6.31 This number supports the top down findings in relation to the number of employees.
- 6.32 As the case studies show, there is a high level of voluntary activity associated with heritage sites. Perhaps at the greatest extent, the National Trust has about five times as many volunteers as staff. Research reported in “Heritage Counts 2009” estimated that 1.1% of the adult population was regularly involved in volunteer activity in the heritage sector. If this is applied to the adult population of Yorkshire and the Humber of 3.7 million (ONS: 2001 Census data) it suggests a volunteer group in the region of over 40,000.
- 6.33 In addition, the Visit Britain report identifies 14 Museums and Galleries (focusing on classic rather than contemporary art) which claim about 2.75 million visits in total and 6 admission charging Museums and Galleries which claim about 540,000 visits. There is a noticeable difference between “heritage attractions” and museums and galleries in that the latter is dominated by free admission whereas the former is not. The 14 museums and galleries listed only represent less than 10% of 150 registered museums in the region (listed in Appendix 2). These could arguably be counted as part of the region’s heritage offer.

Comparison of Top Down and Bottom Up Results

- 6.34 One of the aims of this study has been to use two independent approaches to measuring the economic impact of heritage in the region on the visitor economy. The rationale being that the key findings could then be compared to provide a “sense check” of the validity of the

findings of each method. If the results of each method were supportive of each other, it adds rigour to the credibility of the overall findings of the study.

- 6.35 Key results of the Top Down and Bottom Up approaches have demonstrated a similar order of magnitude. This is shown in the table below.

Figure 6.10: Comparison of Top Down and Bottom Up Approaches

Finding	Top Down Approach	Bottom Up Approach
Visitors to landmark heritage assets (principal purpose)	12.7 million	14.5 million
Employment in the operation and management of heritage landmarks	5,198 FTEs	5,120FTEs

- 6.36 Given the imprecise nature of both methods and the many assumptions each rests on, we would not expect the results to match each other. The similar magnitude of the results is encouraging in suggesting that results produced are a credible estimate of the economic impact of heritage in Yorkshire and the Humber.

Comparison with Previous Studies

- 6.37 It is helpful to stand back from the principal finding of this study and consider it in the context of previous studies.
- 6.38 This study found the GVA impact of the region’s heritage assets to be c. £1.7 billion per annum.
- 6.39 A study completed last year of the economic impact of heritage in the North-West region found an overall GVA impact of £1.6bn per annum.
- 6.40 If the UK wide finding of the Oxford Economic report of £20.6 billion GVA per annum is crudely reduced to reflect the population of the Yorkshire and the Humber region as a proportion of the UK population it suggests a Yorkshire and Humber impact of £1.67 billion per annum.
- 6.41 The findings of this study feel sensible when compared to other previous studies into the economic impact of heritage.

Summary of Findings by Sub-Region

ES11

Leeds City Region (LCR)

- 6.42 Leeds is the principal economic centre within the LCR, however it also includes other key regional cities such as York, Bradford and Wakefield, and also extends into the more rural hinterlands of Craven to the North and Calderdale to the West. Much of the Functional Sub-region Area economy was formerly dominated by the textiles industries and this provides a strong heritage setting. The Leeds, Harrogate, Bradford and York districts are important contributors of the heritage-related tourism economy within the Sub-regional Functional Area. Some key points arising from this study include:

Figure 6.11: Leeds City Region



- n The LCR attracted 19 million day and overnight visitors motivated by the heritage asset, which accounted for just under half of all such visits in the region (the highest of all of the Functional Sub-regions);
- n Total heritage-motivated tourism expenditure in the LCR was circa £1bn, which accounted for 47% of the regional total (the highest of all of Functional Sub-regions);
- n The LCR supports half of the total number of jobs in the region involved in managing and operating heritage assets and over half of the jobs in the region associated with their conservation and maintenance;
- n Heritage-related activity supports in excess of 30,000 jobs in the LCR, representing just under half of the regional heritage-related employment.

Sheffield City Region (SCR)

- 6.43 Sheffield is the core and only city within the SCR, which includes four local authorities within South Yorkshire and five local authorities, two county councils and a national park authority in the East Midlands region, but these have not been included in this study given the Yorkshire & Humber focus. The inclusion of the Peak District National Park within this study could potentially increase the heritage value of the city regional economy further. The SCR forms the basis of the South Yorkshire sub-region and as an area undergoing significant transformational change having formerly been dominated by traditional industries, it is becoming increasingly important once again in terms of its contribution to the regional economy. The Doncaster and Sheffield districts are the key drivers of the heritage-related tourism economy within the City Region. Some key points arising from this study include:

- n The SCR attracted 5 million day and overnight visitors motivated by the heritage asset, which accounted for 13% of all such visits in the region (the lowest of all the functional sub-regions);
- n Total heritage motivated tourism expenditure in the SCR was circa £400m, which accounted for 18% of the regional total (the lowest of all the Functional Sub-regions);
- n The SCR supports 15% of the total number of jobs in the region involved in managing and operating heritage assets and slightly less than a quarter of the jobs in the region associated with their conservation and maintenance;
- n Heritage-related activity supports in excess of 10,000 jobs in the SCR, representing 15% of the regional heritage-related employment.

York/North Yorkshire Functional Sub Region

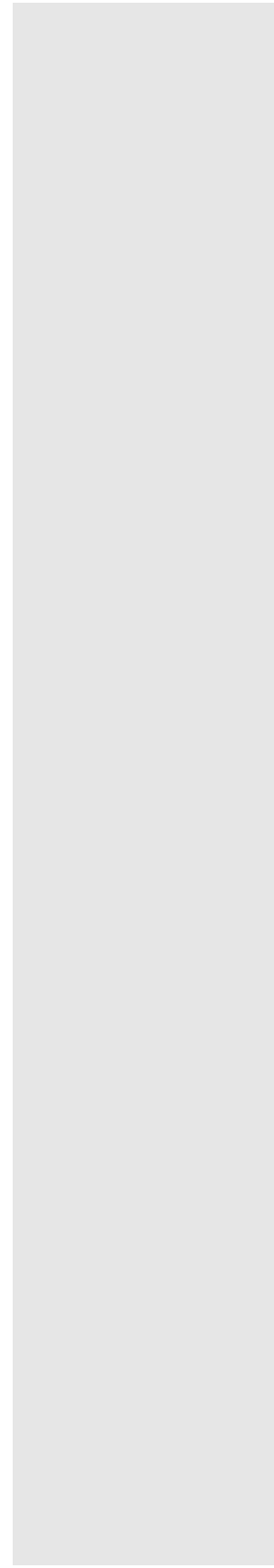
6.44 York is the core urban centre within this Functional Sub Region, which includes eight local authority areas. This Functional Sub Region extends across a significant spatial area, but given its predominantly rural characteristics, has a comparably low population density. The York, Harrogate and Scarborough districts are the key drivers of the heritage-related tourism economy within the Functional Sub Region. Some key points arising from this study include:

- n The York/North Yorkshire Functional Sub Region attracted 1 million day and overnight visitors motivated by the heritage asset, which accounted for one quarter of all such visits in the region;
- n Total heritage motivated tourism expenditure in the York/North Yorkshire Functional Sub Region was circa £550m, which accounted for just under one quarter of the regional total;
- n The York/North Yorkshire Sub-regional Functional Sub Region supports just under a third of the total number of jobs in the region involved in managing and operating heritage assets and one-fifth of the jobs in the region associated with their conservation and maintenance;
- n Heritage-related activity supports in excess of 17,000 jobs in the York/North Yorkshire Functional Sub Region, representing approximately 27% of the regional heritage-related employment.

Hull/Humber Ports Functional Sub Region

6.45 Hull is the core and only city within this Functional Sub Region, which includes the wider Hull District, East Riding of Yorkshire, North Lincolnshire and North East Lincolnshire (the latter two of which have not been included in this study due to a lack of data availability). This is a predominantly rural Functional Sub Region which is also the UK's largest port complex. The city of Hull is a major regeneration focus, and its traditional maritime industries provide a unique heritage-based theme for this. This combined with the market towns and landmark attractions of the East Riding District represent key drivers of the heritage-related tourism economy within the Functional Sub Region. Some key points arising from this study include:

- n The Hull/Humber Ports Functional Sub Region attracted over 5 million day and overnight visitors motivated by the heritage asset, which accounted for over one eighth of all such visits in the region²⁴;
- n Total heritage motivated tourism expenditure in the Hull/Humber Ports Functional Sub Region was circa £400m, which accounted for 18% of the regional total (approximately the same as the SCR);
- n The Hull/Humber Ports Functional Sub Region supports circa 15% of both the total number of jobs in the region involved in managing and operating heritage assets and of the total jobs in the region associated with their conservation and maintenance;
- n Heritage-related activity supports in excess of 8,000 jobs in the Hull/Humber Ports Functional Sub Region (the lowest of all Functional Sub-regions), representing approximately 13% of the regional heritage-related employment.



²⁴ This figure is likely be under-representative of the true number given the unavailability of RVS data for the North Lincolnshire and North East Lincolnshire districts.

PART III – MAXIMISING THE ECONOMIC IMPACT OF HERITAGE

7. Achieving the Greatest Value for Money

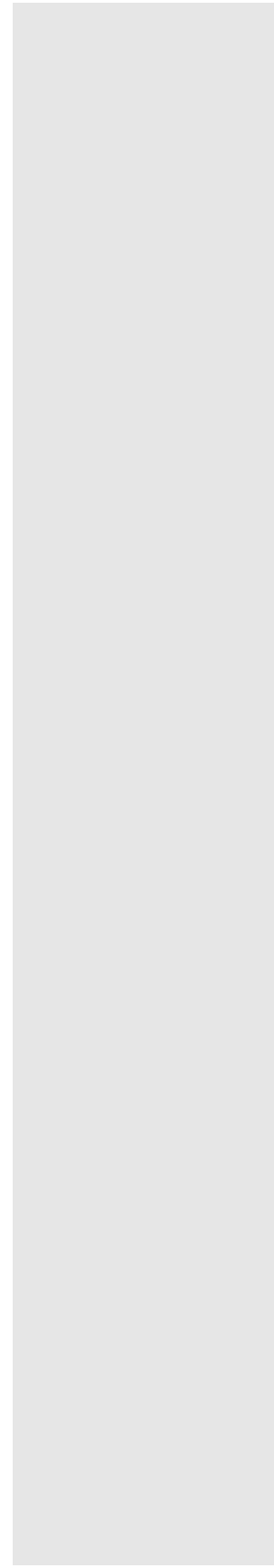
7.1 In considering the range of economic impacts that heritage can have, this study has also reviewed where the impact of heritage has provided the greatest value for money in terms of increasing economic activity. This has informed the thinking of the study team on where the greatest value for money might be achieved in the region going forwards. These suggestions are listed below.

- n **Raising the Profile to increase impact** – the case studies clearly demonstrated that where heritage assets can be joined in their promotion and marketing to raise their profile, there can be a significant benefit in terms of increases in visitor numbers and spend. Given the relatively low cost of including a joined profile raising approach as part of a heritage assets marketing strategy, this principle would appear to be worthy of serious consideration. It may be particularly helpful in the Hull and Humber Ports, Sheffield City Region and Leeds City Region where heritage has a lower profile, generally, than in York and North Yorkshire.
- n **Diversification to generate new activity** – where a heritage asset is able to expand into new areas of activity or uses without significant investment in new facilities, the economic results can be particularly good value for money. This is particularly the case where heritage assets are able to host events that are not perhaps related to the asset but nonetheless provide an increase in visitor numbers and income. The best known examples of this have been at large scale such as the Leeds Music Festival at the Bramham Estate, but opportunities also exist for smaller assets. The refurbished Leeds City Museum and the Yorkshire Sculpture Park have both been successful in attracting business events and the additional income they deliver.
- n **Increasing the quality of place for modest cost** – the ability of relatively modest investment in heritage townscapes to produce a much wider economic impact has been seen throughout the region. Richmond Town Centre is one of the clearest examples, with many others such as Hull Marina and Hebden Bridge. Given that investment in townscapes lends itself to phasing over long periods of time and can be done at relatively small scale, it can be a low cost approach to driving an increasing economic impact over time.
- n **Partnership working delivers best results** – English Heritage, despite all best efforts, can often be seen as a ‘constraint’ to the regeneration process. Whilst this is clearly not the case (see the case study examples) there is a role for EH, we believe, to take a greater involvement in long term regeneration programmes from the outset. Examples such as Richmond, Hebden Bridge and Beverley set out the benefits of maintaining and enhancing the heritage asset in its widest form as a mechanism for enhancing economic activity. EH and its partners can achieve significant benefits from a limited amount of capital investment in these cases.
- n **Policy and its Application** – perhaps one of the lowest cost and hence greatest value for money aspects of heritage is the policy that controls its use and form, and the application of that policy. First, where heritage townscapes of assets are clearly supported by a policy framework, particularly at local level, investors, developers and occupiers gain confidence to commit to an area where they are an “early adopter”.

Second, where the application of policy to balance re-use with preservation is rigid, it can dissuade occupiers or developers from progressing a scheme to re-use a heritage building. Ensuring that heritage is as well represented in policy as it can be and that policy application is as sympathetic to the heritage as the wider economic needs is an area where great value for money could be derived.

Kelham Island is an excellent example where a positive policy framework through the designation of Kelham Island Industrial Conservation Area provided developers with the confidence to invest in the area. At the same time, sufficient flexibility was in place make development in the area feasible.

- 7.2 Pressure on public and private sector funding is forecast to remain for several years to come. The strategies outlined above provide potential to keep raising the economic impact of heritage for the lowest capital expenditure.



8. Opportunities

8.1 The aim of this section is to outline where some of the best opportunities exist to invest in heritage and achieve a significant economic impact.

Dead Landmarks

8.2 As described in Part I of this report:

- n the presence of out of use heritage buildings in town centres can have a disproportionately high impact on the perception and vitality of a town; and
- n out of use buildings provide latent potential to increase economic activity.

8.3 This is particularly the case where the location of that building is particularly prominent or it is in a location that discourages the natural flow of people and activity between two more successful areas.

8.4 The Heritage at Risk Register 2009, for Yorkshire and The Humber, provides an overall summary of where buildings are out of use and/or likely to adversely impact perceptions of the area around them.

Figure 8.1: Summary of Entries in the Risk Register

Functional Sub Regions	Buildings	Monuments	Parks and Gardens	Battlefields	Conservation Areas
Leeds	59	104	6	3	10
York/North Yorkshire	32	375	3	0	11
Sheffield	14	39	1	0	14
Hull/Humber Ports	15	206	1	1	16
Total	120	724	11	4	51

8.5 The 120 buildings listed for Yorkshire and the Humber are worthy of detailed review to understand where the challenge presented by preserving the heritage asset could be an opportunity to increase economic activity in the surroundings. Within the scope and time constraints of this study, a full review of all 120 buildings has not been possible. We have identified a number of buildings, however, that we believe represent the type of opportunities that exist in some cases.

8.6 The table below comprises buildings on the Risk Register and are in various stages of deterioration. The priority categorisation (A – F)²⁵ is noted for each case.

²⁵ A – F priority categories are used by English Heritage as an indication of trend and as a means of prioritising action, A being an “immediate risk of further rapid deterioration or loss of fabric; no solution agreed”, while F is “repair scheme in progress and (where applicable) end use or user identified; functionally redundant buildings with new use agreed but not yet implemented”.

Figure 8.2: Examples of buildings on the Risk Register

North Yorkshire and York

Abbot's Staith
Water Lane
Selby

C15 or early C16, two storey, 'H' shaped plan warehouse built for Selby Abbey. Mainly of magnesium limestone ashlar with some brick. The roof is modern, the building is in poor condition and the roof is deteriorating.



Priority C

Hull and Humber Ports

Norwood House
Norwood Road
Beverley

Circa 1765-70, probably built for the attorney Jonathan Midgley, twice Mayor of Beverley. Used by Beverley Girls' High School until 1996 and vacant since. The fire damaged library has been repaired, but the remainder of the building is neglected.

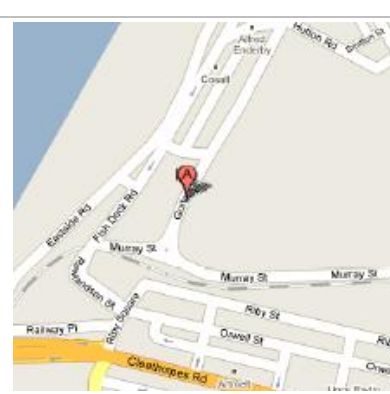


Priority C

Grimsby Ice Factory

Gorton Street
Northeast
Lincolnshire

1900 ice works with extension factory of 1907-8 and later alterations. Closed in 1990. It is thought that this is the earliest surviving ice factory in Britain, and the sole survivor from this period to retain its machinery. Window damage. Roof is now deteriorating rapidly.



Priority A

Leeds Sub-regional Functional Area

Temple Mill
Marshall Street
Holbeck
Leeds
West Yorkshire



Brick-vaulted former spinning shed by Bonomi, Egyptian facade, 1836-40. Brick-vaulted roof with circular rooflights. Failure of tie bar has caused collapse of two front bays. Other bays vulnerable to similar failure. Remedial scheme agreed.

Priority B

Mill Building at Low Mills
Low Mill Lane
Keighley
Bradford
West Yorkshire



Late C18. Early cotton mill, adjacent to supermarket and car park. Application approved for residential use. English Heritage grant offered towards repair works.

Priority D

Sheffield City Region

Leahs Yard
20-22 Cambridge Street
Sheffield
South Yorkshire



Mid C19 cutlery/silversmithing works, with late C19 alterations. General decay, some fire damage. Use for shops and food/drink agreed and included in "New Retail Quarter" proposals. Some patch repairs to the roof have been carried out.

Priority D

Crucible Steel Shop
south corner and
south east side of
former Sanderson
Kaysers Darnall
Works
Darnall Road
Sheffield
South Yorkshire



Crucible steel works,
1872, now disused.
Of international
significance as a
unique survival of its
type. This large two-
storey high section
gives special cause
for concern. The
temporary roof
covering provided in
2003 is now in
tatters.
Priority C

Crucible steel works,
single storey range
dated to 1871 now
disused. Of
international
significance as a
unique survival of its
type. Temporary
coverings have been
provided to the roof,
doors and windows,
and the building is
now weather-tight.
Priority C



25 and 27 High
Street
Rotherham
South Yorkshire

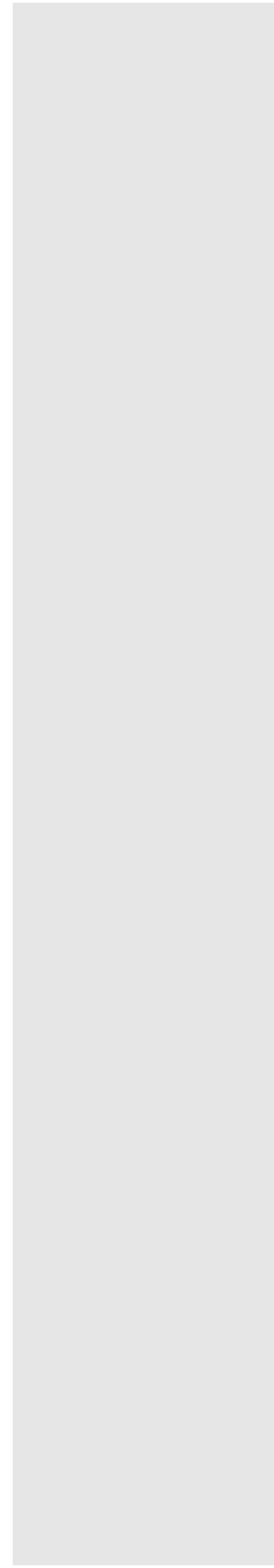


Late medieval house.
Signs of structural
decay, faulty
rainwater goods.
Continued vacancy
and lack of action.
Priority C

8.7 The Grimsby Ice factory is a good example of where a heritage building can become a block to economic activity. The location of the building sits between the modern retail offer in the town, particularly the Freshney Place shopping centre, and the waterfront areas where new development has taken place. The presence of the redundant and dilapidated ice factory between the waterfront and retail areas acts as a barrier to footfall between the two. If the Ice Factory could be brought

back into beneficial use it would encourage footfall between the waterfront and retail parts of the town, which would give a clear economic benefit for the retail, waterfront, Ice Factory and, most importantly, the overall town.

- 8.8 A similar principal applies in Halifax Town centre where 13 listed buildings between King Street and Eureka have largely fallen out of beneficial use and created a negative perception of the town. This challenge has been increased by the difficulties in finding appropriate uses for the Piece Hall to provide a sustainable income stream to meet the costs of its upkeep. A similar position exists in Dewsbury Town Centre.
- 8.9 The difficulty in bringing buildings such as the Ice Factory into use remains significant. Gaining an understanding, however, of the potential economic impact that could be gained by bringing forward schemes to re-use such buildings could be an important step in realising how a wide range of policy objectives and private sector requirements could be met.



9. Recommendations

- 9.1 Having regard to: the range of economic impacts that heritage can have; the extent of its impact in the region; and the opportunities that exist, a number of recommendations have emerged. These are summarised below.
- n **Post-industrial revolution heritage** – the older heritage offer of York and North Yorkshire is well established and known. The post-industrial revolution heritage, which the Sheffield City Region and Leeds City Region are rich in, is less well established. There are many opportunities throughout West and South Yorkshire at a wide range of scales to develop destinations and business around “power house” buildings such as those successfully delivered at Salts Mill, Dean Clough Mill and the Round Foundry.
 - n **Promotion of groups of assets** – promoting heritage assets in combination with other assets – such as at the South Humber Collection – can be very powerful in attracting visitors from outside the region. Potential exists to highlight and promote best practice in this area, for the benefit of smaller assets that might otherwise struggle to get their message across. An example is the idea to use the Roman Road route of Ermine Street from London to York to promote clusters of smaller assets to international visitors arriving in London and wishing to visit Cambridge, Lincoln and York.
 - n **Townscapes and Renaissance, working in partnership** – encourage Local Authorities and other stakeholders to consider the opportunities heritage can provide as a core renaissance/regeneration theme in a town to ensure that heritage assets are providing the greatest input to economic growth they can (particularly relevant where stakeholders consider heritage to be a barrier to economic growth). Help those involved in economic development and regeneration to identify buildings that could be brought back into use, together with highlighting alternative delivery routes. Presentations to regional regeneration conferences would be an effective way of getting this message to key public and private sector individuals involved in regeneration. Working with Local Government Yorkshire and the Humber would be a recommended route to raising this concept.
 - n **Heritage Holiday Destination** – given the increase in holidays within the UK and the expected increase in this trend, promote the region as a heritage holiday destination. This could be initiated through working with Welcome to Yorkshire to identify an effective approach.
 - n **Heritage Holiday Accommodation** – help building owners to think through the potential to re-use heritage buildings for holiday let accommodation. This could be particularly relevant for the more quirky buildings or those in remote locations. It is also relevant where building owners have a previously planned residential scheme (based on 2007 prices and development conditions) that is unlikely to return to viability for many years.
 - n **Developer Education** - the current economic climate means that development activity has slowed with market conditions and developers, particularly small ones with less employees, can have more time to spend considering more involved schemes. It is an ideal opportunity to build developer awareness of opportunities and best practice with heritage buildings. This could include working with developers to consider viability and how higher restoration costs of heritage buildings can still produce a lower development cost than other schemes once site assembly, funding and infrastructure issues/costs are considered. An effective route to

distribute this message to the developer community would be through presentations to Property Forums (such as those in Leeds, York and Bradford) or at targeted Chamber of Commerce events.

- n **Office Space** - provide guidance to occupiers on the type of office environment that can be provided in heritage buildings and the issues/cost involved. Particular emphasis could be placed on the carbon footprint of re-using an older building compared to taking office space in a new building. This could be done through working with bodies that represent property occupiers such as the British Council for Offices, COREnet and the Property Managers Association.
- n **Alternative Uses** – with many uses, particularly residential conversions, being difficult to fund and/or make viable, assistance could be given to helping developers and Local Authorities think through alternative uses that are less impacted by markets, need to be in town centres and are sustainable. Such uses could include health/medical centres, crèches, libraries, gyms and other community uses. Articles in the regional publications of professional bodies such as the RICS would be a useful way to raise the profile of alternative uses and catalyse thinking.
- n **A closer and more supportive relationship with Conservation Officers is encouraged** – Conservation Officers are in many ways the public face of enforcing conservation and preservation. Within the context of the planning system they sit in a position where the need to conserve and/or preserve the historic environment, meets the proposition and implementation of future development.
 - n Relationships involving English Heritage, Conservation Officers, Development Control Planning Officers, Forward Planning Officers and Applicants are complex. The individual approach of a Conservation Officer can vary considerably between Local authorities, and yet it can have a large bearing on the outcome of a Listed Building application or Conservation Area application. That approach will often be well known within the boundaries of that Local Authority.
 - n Professionally, Conservation Officers often work in relative isolation within a Planning and Environment department (for example, there may be 10 planners in Development Control but generally be only one Conservation Officer) and yet often face considerable challenge, confrontation and conflict on a daily basis.
 - n It is important that English Heritage provide support and best practice guidance to Conservation Officers. It is vital to understand the balance between conservation/preservation and the impact on economic prosperity and ultimately, how to allow and guide change within the historic environment.
- n **Guidance on Masterplanning** – in order to ensure that heritage is considered at the outset of site masterplanning, could there be potential for English Heritage to offer an advisory service to developers? Conflict of interest issues would have to be thought through and addressed, and to enable the service to be resourced in line with demand, it is likely that English Heritage would need to charge fees for its early advice.