

HERITAGE COUNTS 2016

Chairman's Message

Our heritage plays a crucial role in shaping the places we live, work and visit. It provides places and people with a link to the past, a symbol of permanence and stability, a sense of belonging – an identity. Places with strong, distinctive identities are more likely to prosper than those without them.

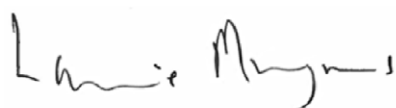
“Place branding” is a concept that helps people identify and maximise the value of the unique qualities of a place. We live in a world where image increasingly matters. The image of a place is important not only to attract visitors but also to strengthen the quality of life for residents and businesses.

Heritage Counts 2016 focuses on the value and practice of “place branding” and the significant role that the conscious marketing of heritage can play in creating a positive identity. New research shows that “place branding” is not only a national, international or city region phenomenon. Local organisations, such as Business Improvement Districts, are increasingly engaged in shaping the image and identity of their local communities. The decentralisation/localism agenda and continuing public finance constraints have shifted the focus towards the local arena and led to the emergence of new local organisations engaged in “place branding”. The research shows that heritage is used extensively in local place branding, providing a “unique selling point” and shaping people’s perceptions and experiences.

The importance of heritage to members of the public is clearly evidenced in the *Heritage Indicators 2016*. Nearly three quarters of the adult population (or 40 million people) participated in heritage in 2015/16 according to the *Taking Part Survey*. In the past year, there has been striking growth in membership of heritage organisations demonstrating the public’s increasing active engagement in heritage. New evidence from the *Taking Part Survey* also shows that heritage participation is progressively becoming more inclusive and appealing to members of the public from all walks of life, with participation amongst key equality groups still below the average but growing at a much faster pace. For example, the gap in participation between people living in the least deprived areas and people living in the most deprived areas decreased dramatically in the past six years – from a gap of 44 per cent in 2009/10 to 24 per cent in 2015/16. These figures are an indication of the transformation that can be achieved through the concerted effort, enthusiasm and hard work of the heritage sector.

Heritage Counts 2016 is a summary document, supported by a considerable wealth of evidence that can be found on the **Heritage Counts website: www.heritagecounts.org.uk**. The website presents all the evidence from this year’s research, including the **Historic Environment in 2016 Overview** that records all new heritage developments and policies from the previous 12 months. You can also find **Regional Reports** and the **Local Authority Profiles 2016** on the website, which compare local level indicators. This year we have provided readers with two new publications within the Heritage Counts package: ***Heritage and Society 2016*** presents evidence of how heritage enhances our wellbeing and quality of life and ***Heritage and the Economy 2016*** reports on the economic contribution of heritage, introducing the ***Heritage Economic Impact Indicator Workbook 2016***, which estimates the economic impact of heritage in terms of Gross Value Added, jobs and tourism income.

Heritage Counts 2016 is the 15th issue in a series which has become an increasingly valuable and comprehensive source of information for all who are involved with or wish to research the heritage sector. It is a truly collaborative publication, relying upon the commitment, passion and inspiration of many people, including some dedicated volunteers. I would like to thank them and all the organisations who have worked so well with us to produce these excellent products.



Sir Laurie Magnus

Chairman, Historic England

Heritage Counts 2016 products

Research:

Heritage and Place Branding 2016

HERITAGE COUNTS 2016 Heritage and Place Branding

Heritage Counts 2016 presents research on the use of heritage in place brands. New research commissioned this year highlights the value of heritage as a source of identity, a source of character and distinctiveness, and as an important driver of competitiveness and place.

Place branding is about communicating and managing the identity and perception of a place.

Local organisations in England are actively engaged in place branding.

Economic benefits from the UK's GREAT national branding campaign

£1 investment = £23 return

Value of the UNESCO brand to the UK

£85m (2014-15)

Evidence from Business Improvement Districts (BIDs)

“Today’s consumer is very market savvy and if a brand is constructed from scratch, they are suspicious, using heritage brings credibility and authenticity to the offer.”
— Newcastle IEL Business Improvement District Company, 2016

Is heritage important to...
your image and identity? ...achieving your objectives?

78% agree
89% agree
51% agree

BIDs see place branding as part of their responsibilities.

Heritage and the Economy 2016

HERITAGE COUNTS 2016 Heritage and the Economy

The historic environment is intrinsically linked to economic activity, with a large number of economic activities occurring within it, dependent on it or attracted to it. Bespoke studies have attempted to unravel the complex relationships and interdependencies between heritage and economic activity to understand and estimate the value added of heritage.

Heritage and the Economy 2016 summarises the findings from these studies and also introduces new research: the Heritage Economic Impact Indicators Workbook 2016. The workbook and technical note can be found on the Heritage Counts website.

Heritage Economic Impact Indicator Workbook (TBR 2016)

In 2016, Historic England commissioned Trends Business Research (TBR) Ltd to produce an interactive Excel-based workbook that estimates the national and regional economic impact of the heritage sector.

Headline findings

Heritage tourism expenditure: **£18.4bn**

Heritage workforce: **328,700 jobs**

Heritage Gross Value Added (GVA): **£21.7bn** (2% national GVA)

Heritage construction output: **£9.7bn**

The Historic Environment in 2016: An Overview

HERITAGE COUNTS The Historic Environment in 2016: An Overview

2016 has been an important year for the heritage sector. The publication in March of the Government's Culture White Paper represented the first comprehensive government strategy for the sector in over 50 years, and the first of its kind to reflect the value of all the cultural sectors. This year also saw the formal launch of the Heritage 2020 framework and first anniversary of the restructuring of English Heritage into Historic England and The English Heritage Trust. On-going reforms to the planning sector also continued to be made covering both legislation and policy.

This year has seen major changes in the country's political landscape. The decision to leave the EU represents a major step into the unknown and the full ramifications of the decisions and its effects upon the heritage sector are yet to be seen. The subsequent resignation of David Cameron and resultant cabinet reshuffle under the new Prime Minister Theresa May brought about the appointment of Karen Bradley as the new Secretary of State for Culture, Media and Sport.

Heritage participation has also featured prominently in 2016 with a number of heritage initiatives and activities taking place, demonstrating the enthusiasm of those who care for heritage. These included the launch of the Enriching the List project, the Discover England Fund, and the Great Place Scheme. 2.4 million people also took part in Heritage Open Days, and over 120,000 children benefited from the Heritage Schools programme.

The heritage sector continued to face many challenges in 2016, with further cuts to funding, the continuing decline in the number of local authority specialists, serious instances of heritage crime, on-going neglect of heritage assets, and unsympathetic planning all representing substantial threats to the historic environment. Proposed changes to the planning system in the past year could also have significant impacts on heritage, especially archaeology. Nevertheless, the sector has continued to display determination and resilience in safeguarding the nation's heritage assets.

This paper is divided into five main sections:

- **Management of Heritage** – covering major heritage-wide developments over the past 12 months.
- **Changes to the Funding and Resource Landscape** – concerning the financial situation of the sector.
- **Planning System Changes** – providing insight into changes to heritage planning on both local and national levels.
- **Participation** – regarding voluntary work and events in 2016.
- **Sector insight** – providing an overview of heritage research, awards, and specific heritage organisations.

Heritage and Society 2016

HERITAGE COUNTS Heritage and Society 2016

Heritage:

1. **Plays an important part in our wellbeing and quality of life** – 93% of residents say that local heritage has an impact on their personal quality of life.
2. **Improves places** – 80% of people think local heritage makes their area a better place to live.
3. **Engages young people** – Almost 2 million children visited a historic property as part of a school trip.
4. **Is viewed positively by the general public** – Nearly all adults (95%) agree or strongly agree that it is important to them that heritage buildings and places are well looked after.

For most people, the historic environment represents the place in which they live and work. 98.3% of people in England live less than a mile from a listed heritage asset.

1. Heritage plays an important part in our wellbeing and quality of life

1.1 **Heritage makes you happy**. People who visit heritage sites are happier than those who do not. The Taking Part survey asked respondents to self-assess their happiness on a scale of 1 to 10, where 10 is 'extremely happy' between 2010 and 2012. On average, those who had visited a heritage site in the previous 12 months, reported happiness scores 1.6% greater than those who had not. See Chart 1 for 2014/15 findings.

The wellbeing value of visiting heritage sites has been calculated as equivalent to £3,046 per person per year. This is the amount of money that would have to be taken away from a person to reduce them to their level of wellbeing had they not visited a heritage site. This figure is more than participating in sports or the arts. Visiting a historic town or city was found to be the most beneficial.

Heritage activity (such as visiting, volunteering and heritage membership) is a driving factor for wellbeing. As part of the 2015 Heritage Index research, areas which scored highly on heritage activity also tended to have higher levels of well-being.

56% of adults surveyed agree that their local area's heritage is important for their personal sense of identity.

Chart 1 – The average happiness score for heritage participants
Source: 2014-15 Taking Part survey findings

8.1 Those participating in heritage
7.8 Those not participating in heritage

1. Historic England 2015 New Evidence Shows Surge in Contributions to Heritage
2. 2014-15 Taking Part survey findings
3. Heritage Lottery Fund BA17 2015-16 pages 12-16
4. Ibid
5. Johnson, D & C. 2014. Culture, wellbeing and heritage
6. Ibid
7. Ibid

Heritage Indicators 2016

HERITAGE COUNTS Heritage Indicators 2016

A vital element of valuing and appreciating the historic environment is understanding the scale, scope and breadth of the historic environment. Since 2002, Heritage Counts has collected and presented indicators about the state of the historic environment. In this document, a summary of the main indicators is presented. The detailed heritage indicator datasets can be found on the [Heritage Counts website](http://www.heritagecounts.org.uk) (www.heritagecounts.org.uk).

The Heritage Counts website also has online [Local Authority Profiles](http://www.heritagecounts.org.uk) allowing users to compare indicators across Local Authorities.

The Heritage Indicators are presented according to the five strategic priorities of Heritage 2020:

- **Discovery, identification & understanding** – Provides indicators on the scale and scope of the historic environment assets
- **Constructive conservation and sustainable management** – Includes indicators on the overall condition of the historic environment with indicators from the Heritage at Risk programme and data on managing the historic environment, including planning statistics.
- **Public engagement** – Presents data on participation in heritage, heritage membership and volunteering in the sector.
- **Capacity building** – Includes indicators of heritage investments from private, public and voluntary sectors as well as the skills and capacity of the sector.
- **Helping things to happen** – Provides data from Building Preservation Trusts and the local authority Heritage Champions initiative.

Shaldevan, Gloucestershire © Historic England

If you require an alternative accessible version of this document (for instance in audio, Braille or large print) please contact our Customer Services Department:

Telephone: 0370 333 0607

Fax: 01793 414926

Textphone: 0800 015 0516

E-mail: customers@HistoricEngland.org.uk