NORTHAMPTON BOROUGH COUNCIL

**SCRUTINY PANEL 2
CULTURE AND TOURISM**

4 DECEMBER 2017

BRIEFING NOTE: BACKGROUND DATA – BEST PRACTICE
1   INTRODUCTION

1.1   At its inaugural scoping meeting, Scrutiny Panel 2 (Culture and Tourism) agreed that it would receive details of best practice to inform its evidence base.

2   EUROPEAN ASSOCIATION - HISTORIC TOWNS AND REGIONS

2.1   The European Association – Historic Towns and Regions produced a document entitled "*Sustainable Cultural Tourism in Historic Towns and Cities".* The Guide was produced in 2006 but the issues contained within are still valid today.

2.2   The reported purpose of the guidelines is to show how cultural tourism can be developed to realise its economic and social potential but in a more sustainable way. The guidelines aim to achieve an integrated and consistent approach to promoting cultural tourism by:

- • Raising awareness of the need to tackle issues of sustainability

- • Establishing a shared framework and a common language

- • Promoting practical action.

2.3   It is reported that the Guidelines are intended for use principally by policy makers and practitioners within municipalities and those governmental agencies best placed to influence more sustainable approaches to cultural tourism. They are designed to help decision makers openly assess their current approach and to develop a clear plan of action relevant to local circumstances.

2.4   The Guidelines uses the following definitions:

- • **Cultural Tourism**: Tourism, the principal purpose of which is to share and enjoy physical and intangible heritage and culture, including landscapes, buildings, collections, the arts, identity, tradition and language.

- **Historic towns and cities**: Historic places and areas, including villages, small towns, cities and parts of larger urban areas with significant cultural and heritage assets.

- **Sustainability:** The Guidelines are based on the Bruntland Commission definition of sustainable development, as development that "meets the needs of the present without compromising the ability of future generations to meet their own needs".

2.5 The Guidelines suggest principles for Sustainable Cultural Tourism:

1. Climate change is a critical global issue and priority should be given to forms of cultural tourism that reduce carbon emissions, conserve rare and precious resources, in particular water and energy, and avoid waste production.

2. Municipalities should attach an intrinsic value to the culture and heritage of historic towns and cities over and above their importance as tourism assets.

3. Authenticity, distinctiveness and the rights and beliefs of local cultures should be respected and underpin approaches to cultural tourism.

4. Tourism is an economically important activity and cultural tourism should contribute to an overall programme of sustainable development. Sustainable Cultural Tourism in Historic Towns and Cities

5. Cultural and heritage assets should be conserved and cultural tourism should contribute to achieving this.

6. The needs of the local community are critical and cultural tourism should be agreed and owned by the host community and the aspirations for it communicated to visitors.

7. Equity is important to long term sustainability and cultural tourism should aim to provide benefits equitably to the local community.

8. Effective management and development requires coordinated action and all local stakeholders, including municipal governments, local communities and businesses, must be involved in the development of cultural tourism.

9. Cultural tourism must respond to the needs of visitors and aim to deliver a high quality visitor experience.

10. The impact of tourism should be reflected in prices to consumers and producers, prices reflecting the real cost to society and the environment.

11. Cultural tourism will be built around more sustainable transport to, within and from the destination.

12. The management and development of cultural tourism should be responsive to change. The complexity of cultural tourism and places means that it will rarely be possible to comply with all of the principles. It

is a matter of balance and each place must seek the position that is right for it. Taking the issues underlying these principles, a structured approach to sustainable cultural tourism can be defined by considering:

- Visitors – their needs, aspirations and wellbeing

- Industry – the need for tourism businesses to be profitable

- Community – respecting the values and quality of life of the local people

- Environment – conserving cultural and physical environments,

A critical challenge for historic places is to decide on the relative priority to be given to each of the components. The priority will vary from place to place and over time – the interaction between place and cultural tourism is always dynamic

2.6   The Guidelines state that sustainable cultural tourism requires careful planning and management and there is a need for a clear starting point by having a meticulous position statement to determine:

   a The key cultural assets of the place

   b. The current profile of tourism to the place

   c. The social, economic and political factors shaping attitudes towards tourism

   d. Regional, national and international tourism trends.

2.7   The Guidelines go on to emphasise the need for clear objectives and policies, processes and delivery and action. Appraisal should also take place.

2.8   The Guidelines highlight that cultural tourism is not static but exists in relationships that affect each other and provides a diagram to demonstrate this:
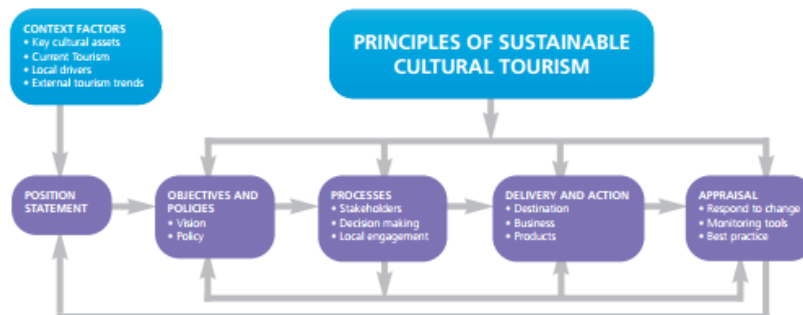

Figure 2 Sustainable cultural tourism – a dynamic process

2.9   The Guidelines explain the importance of the relationship with the visitor and sets out a visitor journey:
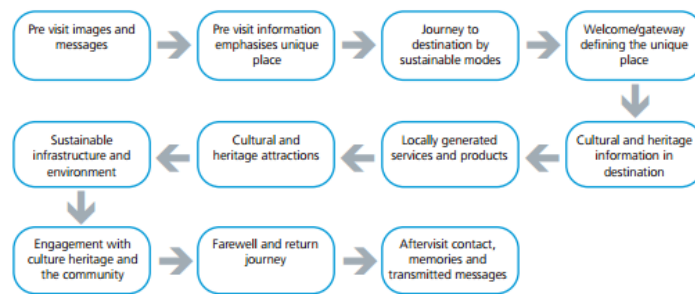

Figure 3 Sustainable cultural tourism and the visitor journey (with acknowledgements to Tourism Site Network)

2.10   The Guidelines suggest that it is good practice to have a Sustainable Tourism Action Plan and suggest the following seven stages:

- Endorse the Principles through adoption as corporate policy
- Establish a stakeholder group of all key interests in the community
- Prepare a collective Position Statement
- Assess the current position against the Guidelines
- Agree actions, resources and timetable
- Implement proposals
- Monitor and review

2.11   A copy of the Guidelines can be located

3   VISIT BRITAIN – CULTURE AND HERITAGE (2010)

3.1   Visit Britain published a paper – Culture and Heritage in 2010.   The Executive Summary of the document is detailed below:

"It could be argued that culture and heritage is the most important part of Britain's tourism offering as at some point it touches every visitors' trip to Britain. Culture is the single most important motivation for city trips, although relatively few visitors view themselves as 'cultural tourists'. However, whilst most wouldn't classify themselves as cultural tourists, research has shown that almost all tourists are interested to learn and experience the culture of the destinations they visit. Importance to Tourism 57% of respondents from 20 countries agreed that history and culture are strong influences on their choice of holiday destination (only 15% disagreed), so it is clear that destinations excelling in this area are likely to be high on travellers' consideration lists. Britain's success in marketing itself as an enticing tourist destination will ultimately hinge on the way it presents its best assets which, as the following section shows, largely revolve around its culture and heritage. According to the Nation Brands Index, in terms of Culture, the UK is perceived to be the fourth best nation out of fifty. This is as a result of Britain being seen as the 4th best nation in terms of having an exciting contemporary culture (e.g. music, films, art, and literature), 7th as a nation with a rich cultural heritage, and 8th as a nation excelling at sports. Britain is ranked 5th in terms of 'Tourism', partly thanks to its rich built heritage (4th) and vibrant and exciting cities (4th). All in all the UK is seen as a highly aspirational destination to visit (ranking 8th). Culture and Heritage tourism's importance is further demonstrated in the proportion it contributes to the tourism economy. VisitBritain estimates that Britain's unique Culture and Heritage attracts £4.5bn worth of spending by inbound visitors

annually, equivalent to more than one quarter of all spending by international visitors, and thereby underpins more than 100,000 jobs across the length and breadth of Britain. The 3 Pillars of Cultural Tourism There is universal agreement amongst the tourism industry that Cultural Tourism is an incredibly difficult thing to define and there seems to be little agreement on what actually constitutes "Cultural Tourism". Additionally it can be difficult to separate 'Culture' and 'Heritage' in the mind of the consumer as they are inherently linked. Britain's culture and heritage offering is expansive and exists in many different forms such as built/historical heritage, popular culture, living culture, shared culture, cultural events, culinary culture, and cultural products to name but a few. However, when we drill down, three key pillars seem to exist: Cultural Heritage (e.g. Shakespeare), Built or Historical Heritage (e.g. Tower of London) and Contemporary Culture (e.g. modern art, theatre). Different mind-sets underpin trips to Britain and visitors often act on a continuum of experience from the shallow ("doing the attractions"; "been there, done that"; "ticking off the list") to the deeper more meaningful experiences. With the latter, there can be more profound interest in Britain and attractions e.g. the significance of attractions. Even when culture is not the primary motivator for travel, visits to cultural attractions are still an important part of the holiday experience. The Role of Cities City tourism and culture have a strong partnership – they are highly interrelated although many city trippers don't define themselves as "cultural tourists" despite the activities they are undertaking. As we have seen there are different types of "cultural tourists" and there are opportunities to address their motivations in different ways. Cities that are able to offer new reasons for a visit will be in a much stronger position to face the competition. This involves the need to reinvent the wheel and present new cultural tourism products to consumers. Built Heritage Britain's rich history and heritage continue to be strong drivers in attracting visitors. Famous buildings and monuments, castles and stately homes, and churches/cathedrals are all well regarded and interest is reflected in visit numbers. Britain is seen as a world-class destination in terms of its built heritage, ranked 4th out of 50 nations in the Nation Brands Index (2009). The UK's built heritage is most highly regarded in Australia, the USA, Canada, and South Africa, but almost all nations and age groups see Britain's built heritage as a priority if they were to visit Britain, so it should be very prominent in marketing materials. It is essential that Britain is seen not only as a destination with a world class historical offering, but also as an exciting destination, with the power to surprise and engage visitors on a more emotional level. One way this could be achieved is by combining Britain's heritage with contemporary activities; castles hosting live concerts, museums holding fashion shows, or adrenaline-packed speedboat rides on the Thames. Research has shown these sorts of concepts to be particularly exciting for potential visitors. Cultural Heritage Britain is ranked 7th out of 50 nations in terms of its cultural heritage (NBI) and is most highly regarded in the USA, Australia, Canada, South Africa, Poland, Argentina, and Russia. Countries that have ancestral or historical links with Britain are interested in Britain's cultural heritage, as to a large extent this is considered part of their own. As each nation of the world has their own culture and customs, it would be naive to assume that each nation would find every aspect of Britain's cultural heritage appealing. In fact, there is a great deal of variation in the way that nations perceive it, but the positive story is that the diversity of Britain's culture means there is something for everybody. Visiting museums is regarded as the 4th best activity in Britain (out of 32) and ranks 3rd on potential visitors' to-do-lists - a key strength for Britain and a motivator to visit. Museums are slightly more appealing for older visitors than younger ones, but younger visitors still see themselves as very likely to visit museums if they were to visit Britain, and visitor statistics show they do. Going to a pub in Britain is far more appealing to more mature markets. British pubs ride high consistently on the list of positive perceptions about Britain. Research shows that the traditional British pub has a role to play in improving perceptions of welcome along with offering authentic eating and drinking experiences. Shared culture is seen to be very important in many markets. For many Europe is a key part of their heritage and many associate it with their own heritage. A large part of Britain's attraction comes from the perception it has looked after and nurtured its past. There is a sense of emotional familiarity and comfort with Britain as many have grown up seeing, reading and hearing about Britain. Britain is the birthplace of many

sports which makes them appealing to watch whilst in Britain. It is not only the thrill of watching sport that attracts overseas visitors, many make a pilgrimage to Britain in order to participate in sport. Football is a success story and is of particular interest to men, with younger age groups most keen on going to a match. Ireland and Norway are key markets, but Asia loves the Premier League too.

Britain's royal heritage plays a crucial role both through the built heritage legacy of monarchy and through the many legends and stories associated with royalty. In 2008 nearly five million experienced one of the properties overseen by either Historic Royal Palaces or the Royal Collection. English Royalty is linked to Britain's strong tradition and heritage image and 'royalty' and 'the Queen' are key associations that people have with Britain. The image of Britain we often find is influenced by that depicted in books. These are often reinforced by the Britain that people from these countries learn about at school. British food still comes up as an issue in overseas markets; it's almost a hardened stereotype, but also a very subjective one and one which will vary. We also know that food and eating out is an important driver to many tourists but research shows that a "good range of local food and produce" and a "wide choice of food from different cultures" is still seen to be a weakness for Britain. Contemporary Culture Britain is ranked 4th out of 50 nations in terms of having an interesting / exciting contemporary culture such as music, films, art and literature (NBI, 2009), and 4th in terms of its vibrant and exciting cities. The UK's contemporary culture is most highly regarded in Sweden, Poland, Australia, South Africa, Russia, Argentina, and Mexico. Amongst the youth market, the UK is seen as a great destination for music, fashion and alternative scenes. From a youth perspective, the US, France, Italy (and Spain to a lesser degree) are Britain's biggest competitors. VisitBritain's research and analysis shows that Contemporary Cultural activities often appeal more to particular age groups or nationalities than others. This means it is particularly important to understand your audience when marketing these sorts of activities. Many contemporary activities currently appeal more to nations with cultures not dissimilar to Britain's. On balance, the Nordic nations are most keen on these activities (especially night-time activities), whilst other Western European nations, the Americas, and Australasia are much more positive than Asian nations (for whom shopping clearly holds the most appeal). Hitting the shops is not rated as one of the best activities to do in Britain by potential visitors (it has strong competition from many other activities), but it is seen as an activity that many see themselves as likely to do if they were to visit Britain, especially females. Films can be used as a good PR tool to promote Britain overseas. However it should be noted that visiting places from films/tv is rated as the 25th best activity in Britain by potential visitors (out of 32). Furthermore, the small proportion of visitors going to film locations demonstrates that these are very much niche activities for visiting. Going to bars or clubs in Britain is far more appealing to residents of Europe, the Americas, and Australasia than to residents of Asia. The Nordic nations see Britain's bars/clubs as one of the most exciting aspects of a trip. Britain has long been a pioneer in terms of leading world music, but going to live music events is not a top priority for many potential visitors (19th out of 32 activities). We need to remember that music is not a key driver to visit Britain but something that people may be interested in doing once in Britain. It should be considered 'a hidden opportunity'; encouraging more visitors to go to live music events, cultural events, and festivals once they have decided to come to Britain should enhance their experience and make recommendations and return visits more likely. Over the centuries, Britain has had a huge amount of influence on world culture and many visitors have an interest in British icons and symbols they have heard so much about. However not all nations identify with modern British cultural icons. Our challenge is to educate prospective visitors that Britain is a cosmopolitan destination with a wide range of experiences and activities on offer. However we need to be careful to only accentuate the positives of cosmopolitan Britain as this "cosmopolitaness" doesn't necessarily appeal to everyone. The key to success Britain's mix of "culture" is key to our success: from heritage, the arts, museums, through our creative industries (e.g. fashion, music, design, media) to living / contemporary culture (e.g. language, traditions, festivals, sport, cuisine). While some visitors exhibit a more profound interest in learning and understanding rather
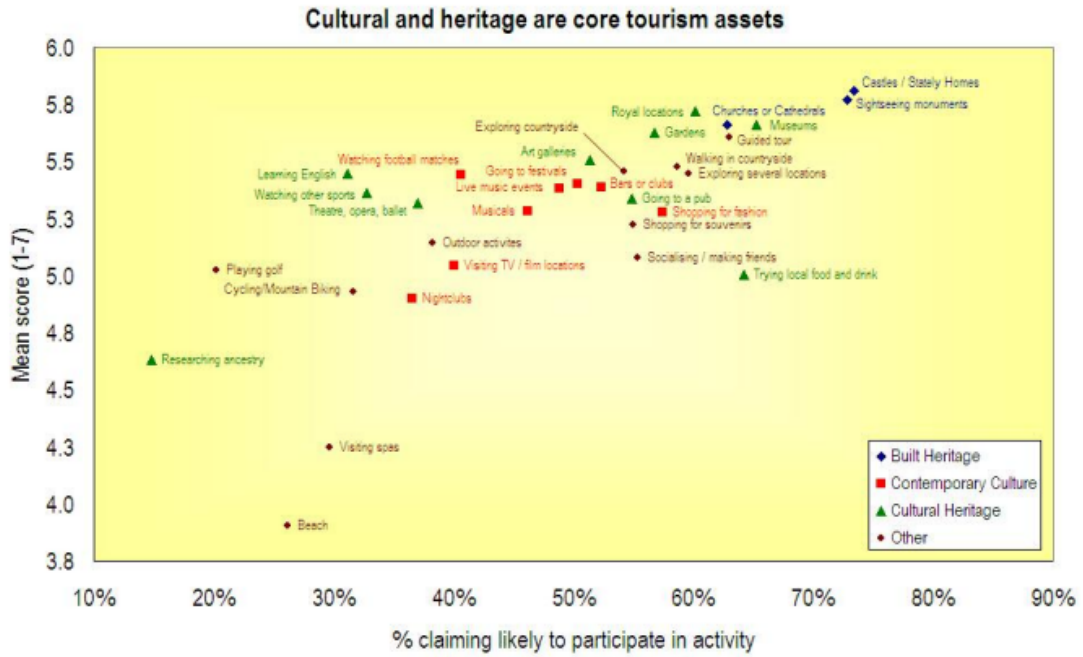
than just seeing sights, a much larger proportion are involved in "cultural activities" just by their involvement in enjoying the intangibles of a place - soaking up the atmosphere and watching life pass by. So going forward, in order for Britain to survive as a must- see destination and to keep giving visitors a reason to keep coming back, British tourism needs to look at how it presents its culture and heritage as an inspiring mix of the old and the new. In communications we must show that Britain is an evolving country and society, a dynamic evolution of food, music, fashion, mix of people – a cool and modern society, yet that it still retains its quintessential British values of fairness, confidence, humour and outward focus. It is crucial to move people beyond perceptions of Britain as a stagnant society stuck in post-war England and allow them to experience the heart of genuine, evolving Britain which has managed a synthesis between old and new."

3.2   The document defines Cultural Tourism – *"There is universal agreement amongst the tourism industry that Cultural Tourism is an incredibly difficult thing to define and there seems to be little agreement on what actually constitutes "Cultural Tourism". In its study of City Tourism and Culture within Europe, the European Travel Commission (ETC) suggests that cultural tourism in an international context is "A movement of persons to specific cultural attractions, such as, heritage sites, artistic and cultural manifestations, arts and drama to cities outside their normal country of residence". ATLAS (Association for Leisure and Tourism Education) defines it as "the movement of persons to cultural attractions (such as heritage sites, artistic and cultural manifestations, arts and drama) in cities in other countries than their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs." The definition of the word "culture" also complicates things. It not only encompasses traditional culture such as visiting museums, music and theatre performances, galleries, cultural heritage etc., but also the way of life in a certain area including aspects of language, beliefs, cuisine, dress, customs etc. and the products that arise from it (e.g. architecture, atmosphere). Cities tend to offer all three elements to the visitor:*
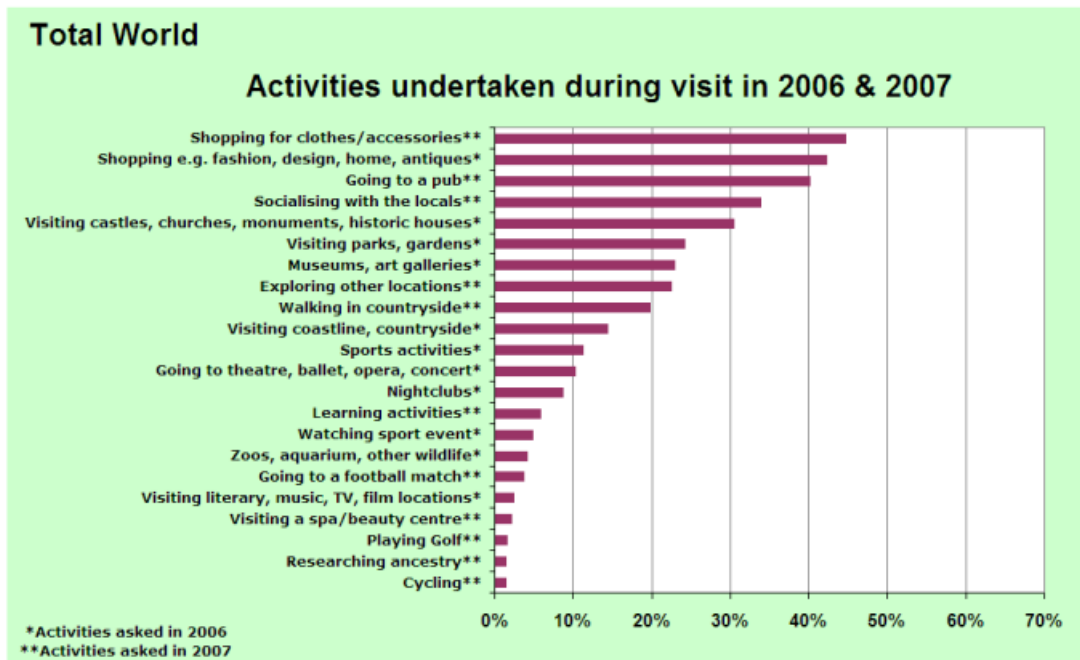
> • *Heritage = artefacts relating to the past*
> • *The Arts = contemporary performing and visual arts*
> • *Creative = the creative industries"*

3.3   The document defines Heritage Tourism – "*Zepple and Hall 1992 describe it "as an encounter with or an experience of being part of the history of a place through visiting historic sites, monuments, and landscapes. It focuses on learning and includes the experience of local traditions, social customs, religious practices and cultural celebrations. Historical tourism is a form of heritage tourism: its main focus is to stress the experiences of the past". Additionally, it can be difficult to separate Culture and Heritage in the mind of the consumer because they are inherently linked. Culture is an association with the human world including art, ideas and rituals as well as monuments, architecture and history whereas Heritage is more about the past. As we have determined cultural and heritage tourism is difficult to define as it encompasses so many different elements of a destination. Britain's culture and heritage offering is expansive and exists in many different forms such as built/historical heritage, popular culture, living culture, shared culture, cultural events, culinary culture, and cultural products to name but a few. However, when we drill down, three key pillars seem to exist: Cultural Heritage (e.g. the legacy of Shakespeare and his literature), Built or Historical Heritage (e.g. Tower of London) and Contemporary Culture (e.g. modern art, theatre). Although it can be hard to pull these apart within a destination for the purposes of this report we have grouped culture and heritage tourism in the following way: Built heritage, Cultural Heritage and Contemporary Culture and together these form a large chunk of the foundation of why visitors come to Britain.*"

3.3 The document highlights that heritage and cultural activities are the most appealing activities for potential visitors:

Cultural and heritage are core tourism assets

Mean score (1-7)

Castles / Stately Homes
Sightseeing monuments
Royal locations ▲ Churches or Cathedrals
▲ Gardens ◆ Museums
Exploring countryside ◆ Guided tour
Art galleries ▲ Walking in countryside
Watching football matches ◆ Exploring several locations
Learning English ▲ Going to festivals
Watching other sports ▲ Live music events ■ Bars or clubs ▲ Going to a pub
Theatre, opera, ballet ▲ Musicals ■ ■ Shopping for fashion
◆ Shopping for souvenirs
■ Outdoor activites
◆ Playing golf ■ Visiting TV / film locations ◆ Socialising / making friends
Cycling/Mountain Biking ◆ ▲ Trying local food and drink
■ Nightclubs

▲ Researching ancestry

◆ Visiting spas

◆ Beach

Legend:
◆ Built Heritage
■ Contemporary Culture
▲ Cultural Heritage
◆ Other

% claiming likely to participate in activity

3.4 The document goes on to state that it is important to consider which activities actual visitors to the UK undertake. It provides a chart, as detailed below, showing the proportion of overseas visitors undertaking various activities in 2006 and 2007. The information was gathered from responses to the International Passenger Survey (IPS.)

Total World

Activities undertaken during visit in 2006 & 2007

Shopping for clothes/accessories**
Shopping e.g. fashion, design, home, antiques*
Going to a pub**
Socialising with the locals**
Visiting castles, churches, monuments, historic houses*
Visiting parks, gardens*
Museums, art galleries*
Exploring other locations**
Walking in countryside**
Visiting coastline, countryside*
Sports activities*
Going to theatre, ballet, opera, concert*
Nightclubs*
Learning activities**
Watching sport event*
Zoos, aquarium, other wildlife*
Going to a football match**
Visiting literary, music, TV, film locations*
Visiting a spa/beauty centre**
Playing Golf**
Researching ancestry**
Cycling**

*Activities asked in 2006
**Activities asked in 2007

8

3.5   The briefing note reports on the cultural tourist, which it says can been categorised into the following categories:

- The purposeful cultural tourist /culture vulture - cultural tourism is the primary motive for visiting a destination and the tourist has a deep cultural experience.
- The sightseeing cultural tourist - cultural tourism is a primary reason for experiencing a destination, but the experience is less deep.
- The serendipitous cultural tourist - A tourist, who does not travel for cultural reasons but who, after participating, ends up having a deep cultural experience.
- The casual cultural tourist - cultural tourism is a weak motive for travel and the resulting experience is shallow.
- The incidental cultural tourist - the tourist does not travel for cultural reasons, but nonetheless participates in some activities and has shallow experiences

3.7   Other areas are also reported within the document such as cultural parenting. The importance of education is highlighted, for example parents wanting their children to have experiences that ensure they are cultured and well rounded.

3.8   The document states that Britain is often described by visitors as offering a "good contrast of old and new."

3.9   The document provides key facts around built heritage:

- Britain's built heritage is world-class, ranked 4th out of 50 nations by potential visitors
- France and Italy are Britain's major built heritage competitors
- Built Heritage is something that most visitors want to experience, appealing to all ages
- Britain's built heritage is seen to be iconic
- However, it may not provide visitors with a sense of urgency to visit now, so it is important to add an exciting twist to market more effectively

3.10   Britain's rich history and heritage is a strong driver in attracting visitors.

3.11   The document provides details of castles and stately homes, churches and cathedrals around the UK and visitors to these. It goes on to report on other attractions such as the museums.

3.12   Pubs are seen as a tourist attraction, for example in 2007, there were over 13.2 million overseas visitors going to a pub in the UK.

Purposes of visiting a pub were categorised in the document as:

- 46% of Holiday visitors
- 48% of VFR visitors
- 26% of Business visitors
- 33% of Miscellaneous visitors
- 43% of study visitors

Nightclubs and bars are also seen as key to tourism. For example in 2006 2.8 million overseas visitors went to a nightclub in 2006.

Purpose of visiting a nightclub in the UK:

- 41% of Holiday visitors
- 19% of VFR visitors
- 7% of Business visitors
- 11% of Miscellaneous visitors
- 48% of Study visitors

3.13   Food and drink is also reported as a key source of pleasure. The street food scene is important.

3.14   Sport is a key tourist attraction, and the document refers to football and the premier league. Britain being the home of football.

3.15   The document highlights the importance of Britain's cultural heritage the range of celebrations.

3.16   The document provides key facts regarding contemporary culture:

- Britain is ranked 4th out of 50 nations for its contemporary culture and its vibrant cities
- Key competitors are the US, Italy and France
- The UK's contemporary cultural activities are more appealing to nations with a similar culture to Britain such as the Nordic nations
- British food is still perceived to be a weakness
- Cosmopolitan Britain can be a key strength but does not appeal to everybody

3.17   The importance of music is also highlighted within the document.

3.18   The document refers to shopping in the UK, in particular design and fashion. According to the IPS 14.6 million visitors from overseas went shopping for clothes and accessories in 2007:

- 60% of Holiday visitors
- 55% of VFR visitors

- 17% of Business visitors
- 34% of Miscellaneous visitors
- 61% of Study visitor

3.19   Festivals are also reported as a key visitor attraction.

3.20   The document reports on the value of culture and heritage to the UK. It was estimated that in 2006 it attracted a spend in the UK of £4.5 billion supporting more than 100,000 jobs.

3.21   A copy of the document can be located.

4   VISIT BRITAIN – INBOUND CULTURE, HERITAGE AND ATTRACTIONS RESEARCH

4.1   In 2011, Visit Britain sponsored research in the IPS on activities visitors undertook whilst in Britain. The findings are detailed below:

Activities undertaken by visitors to Britain

Activities asked about	Visits which involved activity			Nights spent in UK*	Amount spent in UK*
	Visits (000)	% of all visits	% of holiday visits	Nights (000)	£(m)
Visited museums or art galleries	8,299	27%	43%	86,146	£6,255
Went to theatre / musical / opera / ballet	2,796	9%	14%	33,838	£2,748
Visited castles or historic houses	8,874	29%	48%	91,245	£6,506
Visited religious buildings	6,738	22%	35%	74,920	£4,948
Visited parks or gardens	11,081	36%	54%	114,312	£7,826

* By those whose visit included the activity. Nights and spend are not specifically whilst under-taking activity but throughout visit to UK

Source: International Passenger Survey 2011

4.2   Visit Britain further reports that in 2015 the UK was ranked 3rd for contemporary culture, 5th for historic buildings and 6th for cultural heritage (out of 50 nations):

UK rank*	2008	2009	2010	2011	2012	2013	2014	2015
Tourism	4	5	5	4	4	4	3	4
Historic buildings	4	4	4	4	5	5	5	5
Vibrant city	4	4	4	4	4	4	4	4
Culture	3	4	6	4	4	4	5	5
Contemporary	4	4	4	4	3	3	3	3
Sport	7	8	8	5	6	5	4	4
Cultural heritage	6	7	7	7	7	7	7	6

Source:GfK Anholt Nation Brands Index 2008-2015

*rank out of 50 nations

5   HISTORIC ENGLAND – PLACE BRANDING AND HERITAGE

5.1   Historic England, in 2016, published its paper "Place Branding and Heritage". In March 2016, TBR was appointed by Historic England, and worked together with Middlesex University and Pomegranate Seeds, to deliver a project that explored the concept of place branding and the ways in which heritage was (or was not) being incorporated into and adding value to place brands.   It is reported that following a scoping exercise, Business Improvement Districts (BIDs) were confirmed as the vehicles to engage; these self-financing organisations are becoming ever more common across England and often engage with activity that partially or wholly resembles place branding.

5.2   The report highlights the findings from the research and associated best practice (Extract from its Executive Summary):

"The aim of this project is to produce a thorough assessment of the extent to which heritage currently contributes to place branding, how this can be valued, and how organisations engaged in place branding might seek to maximise heritage's contribution to their place brands. These organisations are likely to include, but not be restricted to Business Improvement Districts (BIDs): the findings of this project should appeal to all organisations involved with place branding (and any activity associated with place developing, identity and shaping) and with an interest in how heritage could be incorporated to enhance the places. BIDs were selected as the primary group of organisations with which to engage following a scoping exercise, as described in the methodology section, of the report.

This project was delivered through a series of research stages that encompassed both quantitative and qualitative research. The initial scoping stage sought to establish the rationale for the project through two separate activities: firstly, to provide an intellectual foundation for the project through a detailed literature review and, secondly, to consult directly with a selection of BIDs in England to determine whether or not they were an appropriate set of organisations to engage in this project. Having established the rationale for the project, BIDs were stratified by their apparent engagement in heritage and/or place branding. This was achieved through analysing the presence of agreed search terms (covering place branding and heritage) in each BID's most recent key document. All BIDs in England were then invited to complete an online survey to generate primary quantitative data structured around the key questions that direct this project. These quantitative data were supplemented by qualitative engagement with BIDs that generated seventeen detailed case studies. The research output was then enhanced by input from experts in heritage and, separately, place branding who were interviewed individually. Finally, the interim findings were presented to, discussed by, and further developed at a focus group attended by a group of sector experts. As with the full project, the executive summary consistently refers to place branding. Although we recognise that the terms place making/shaping/branding/identity are not interchangeable (the differences are captured in the detailed literature review) they are all part of a family of terms that may be grouped together as place development. In this sense, we feel that the findings of this study can be applied to place development activities that may extend beyond place branding.

The document sets out the key findings from the research and the associated 'good practice' points that form a key part of the study output. These are structured to respond to the five key research questions that directed the form and execution of this project.

Good practice guidelines are highlighted within the content and respond to the research questions that most demand practical recommendations for action.

What is place branding and what is the value of place branding? Definitions of place branding vary but derive from product branding and marketing; essentially a place brand is a perception that people have about a place and its reputation in the eyes of residents, businesses, investors, workers, visitors and the wider public. Place branding has also evolved from earlier (nineteenth/twentieth century) place promotion and boosterism and the 'art of selling places' in response to economic and social change and greater inter-city competition, using a place's heritage and historic associations.

Place brands look to project a positive image of a place to potential visitors, potential residents, and potential investors. The brand is the signal that people may wish to visit, live or invest in this location. Measuring and valuing place brands is undertaken through media/content analysis and perception studies of stakeholders views (e.g. experts, businesses, residents), as well as city ranking using proprietorial indices. When asked about the benefits that BIDs believed were accrued by places with strong brands, increased visitor numbers (89%), improved economic performance (86%) and increased media profile (86%) were the three outcomes most frequently selected. Is heritage a suitable element of place branding? Heritage is acknowledged as an important element in place branding, but this is often under-developed and not directly measured in place brand valuation. Heritage and historic buildings and places are an increasingly popular and locally valued and often premium location for creative and other new businesses. The role and contribution that heritage assets make to place branding are under-researched and often implicit but not explicit in place branding strategies - this research therefore represents an important contribution to knowledge and practice in this field.

Analysis of keywords within BIDs' most recent business plans and key documents revealed that almost two thirds (63%) contain terms associated with place branding. When asked, almost three quarters (71%) of BIDs felt that they were currently engaged in delivering place branding and almost four fifths (78%) see place branding as part of their responsibilities. Of the 29% of BIDs not currently engaged in place branding, half were engaged in place making, with the remainder engaged in some form of destination marketing and/or events. BIDs currently engaged in place branding very rarely take sole responsibility for its delivery (4% of those surveyed). They often work collaboratively with, for example, the relevant Local Enterprise Partnership (52% of those surveyed) and/or destination marketing organisation (40%). The phrase 'place branding' may not achieve universal approval amongst rate-paying businesses because it can sound like marketing jargon. In some instances, this led BIDs to pursue place branding activities without presenting them as place branding. BIDs were also unlikely to engage with place branding as part of the initial election campaign; they often felt more comfortable engaging with place branding once they had become more established. This extended, in one example, to commissioning the development of a place branding toolkit.

Heritage is used extensively by BIDs to assist with place branding and place making strategies. Where BIDs did engage with heritage, this invariably extended beyond the most obvious heritage assets in their area to include less prominent, intangible heritage. Individual examples of heritage being used by BIDs to assist place branding include offering local heritage tours to recently arrived businesses, developing smartphone applications (apps) that update with thematic heritage trails that include GPS directions, and leading larger, externally funded projects to restore and maintain heritage buildings. If BIDs did express scepticism about heritage, it was that it could inhibit the development and/or introduction of a contemporary place brand. Heritage tends to be dominated by a very historic narrative; embracing more contemporary heritage is something that would appeal to BIDs.

Place branders often seek to appeal to a range of different audiences. These audiences include visitors, businesses and residents and each have different requirements and impose different demands on the place brand. Heritage provides an authenticity to place brands that appeals across the full spectrum of audiences. 89% of surveyed BIDs felt that heritage played an important role in the image and identity of a place and 80% felt that heritage was important to visitors' perceptions of their BID area. For places seeking to attract visitors and/or investment, heritage can provide a unique means of differentiation from competitors. However, value is a relative concept. Heritage may be seen as less valuable in places that have very strong economies, for example. Places that currently offer highly skilled labour forces, excellent transport infrastructure, ready access to sources of capital, high quality business premises, and a stable macroeconomic environment are less likely to need to rely on heritage as a promotional 'asset' (irrespective of whether or not it is present) because they are able to offer a compelling investment (or other economic development) proposition without it.

When surveyed, 98% of BIDs were aware of at least one heritage asset within their BID area. The most frequently identified heritage assets were listed buildings (by 88% of respondents), followed by conservation areas (68%), and museums and archives (66%). These assets tend to be highly visible and, perhaps, difficult to ignore. When asked about accessing information on less visible assets, BIDs made reference to knowledge across their board members (many of whom are senior figures within the area) and also to local intelligence captured from volunteer ambassadors or street rangers, whose passion for the locality led to them taking the role and extends into local heritage.

Despite possessing existing knowledge of heritage assets, 57% of surveyed BIDs said that they would like to find out more about heritage in their local area. Of those, the type of information most frequently selected as being of interest was the economic value of heritage. The format in which the BIDs interested in finding out more about local heritage would most welcome receiving this information was by accessing a website. Good practice guideline:

- *All areas will have heritage both tangible and intangible, although the scale and appeal of the asset(s) can vary significantly. Auditing these assets would be valued by place branders. Applying the Cultural Physical Asset Mapping toolkit (available at https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/71127/DCMS_Mapping_Toolkit.pdf) developed under the DCMS CASE programme could be helpful in identifying and classifying a wider range of cultural and heritage assets in a BID (or equivalent area).*

BIDs are accustomed to managing and monitoring the impact of their activities. Established metrics such as footfall monitors, dwell time analysis, and visitor satisfaction surveys are typically used to provide the requisite information. BIDs recognise the limitations of these measures, however, and displayed an appetite for a more detailed approach to measuring the benefits of maintaining and investing in heritage. This would ideally involve quantitative data that included a measure of return on investment.

The Heritage Counts Economic Indicators, published in October 2016 (and available at https://historicengland.org.uk/research/heritage-counts/heritage-and-the-economy/) are a welcome resource in this respect and should be promoted accordingly. How can the role of heritage as a key economic development lever be reinforced? Different economic development agencies have different priorities and at different spatial scales. It is important, therefore, that evidence of the value of heritage is sufficiently flexible and segmented to respond to these different needs. These can vary from evidencing the quality of life that heritage supports and that would be available to employees of a business should they invest in new premises in a particular location to providing a more comprehensive day out that will convince day visitors within a one-hour drive time to spend a full day somewhere rather than a couple of hours.

Whilst the majority (93%) of surveyed BIDs were aware of and used their heritage assets in some way, the most commonly reported uses were to provide images for corporate materials (73%) and as a means of attracting people to a place (68%). Conversely, less than one third of surveyed BIDs (29%) reported using heritage assets more strategically as part of longer-term planning. Heritage events and festivals were often BIDs' first exposure to the active use of local heritage. Although such events can reinforce a place brand, they need at least to be coordinated to make a meaningful contribution. They are more likely to act as a stimulus for BIDs to engage with heritage, which may subsequently lead to a more coherent place brand. There is a danger that a fascination with more distant history discourages place branders from embracing heritage. This is because place branders feel that this restricts their ability to project a more modern image. BIDs provided examples of interpreting medieval heritage in a modern setting and of deliberately contrasting an historic place brand with contemporary imagery. BIDs expressed a keenness to embed heritage across an entire place and not restricted to a set of buildings, e.g. museums. This broadens the scope and appeal of the place brand, and BIDs reported developing heritage trails (sometimes using digital technology) as a means of achieving this. The benefits of maintaining and promoting heritage are often long-term and accrued more by the owners of commercial buildings than by tenants. The consequence of this is that this group may need to be identified and engaged in order to become advocates for heritage investment.

Good practice guidelines:

- *Introducing annual 'heritage in place branding' awards would help to raise the profile of heritage and establish it as a core component of place branding. It would also, over time, develop a valuable reference library.*
- *Develop an online resource with information on local heritage that can be accessed by place branders. As place branders' interest in heritage intensifies this can be supplemented by knowledge exchange with heritage experts.*
- *Very few place branders have a significant financial resource on which to draw. As a consequence, working in partnership with them to develop projects that can attract external investment in heritage is likely to be more productive than seeing the organisations themselves as sources of investment.*
- *Influencing place branding guidance represents a good opportunity to increase the presence of heritage in place branding, recognising that BIDs were unlikely to engage with heritage immediately.*
- *Materials that communicate the value of heritage need to be flexible enough to respond to the varying demands of different place making and economic development agencies."*

5.3   The full report can be located .

6   RECOMMENDATION

6.1   That the information provided in this briefing note informs the evidence base of this Scrutiny Review.

Author: Tracy Tiff, Scrutiny Officer, on behalf of Councillor Jamie Lane, Chair, Scrutiny Panel 2 – Culture and Tourism

                  5 September 2017