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# HERITAGE AT THE HEART OF TOURISM

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**“HERITAGE IN THE NORTH WEST IS THE REGION’S MOST UNDERPLAYED TOURISM ASSET. HERITAGE IS MORE THAN HISTORY, IT ATTRACTS VISITORS WHO STAY LONGER AND SPEND MORE, CONTRIBUTING SIGNIFICANTLY TO THE GROWTH OF THE NORTH WEST’S ECONOMY”** Loyd Grossman, Chair, Culture Northwest

## HERITAGE in the North West...

### ...IS OUR REGION’S FOUNDATION

**With two historic properties for every square kilometre of the region there are over 27,000 heritage reasons to explore the North West\*.**

\*All facts from Heritage Counts: The State of England’s Historic Environment and the State of the North West’s Historic Environment 2006, English Heritage, unless otherwise stated.

<http://www.english-heritage.org.uk/hc2006/>

<http://www.english-heritage.org.uk/hc2006/server/show/nav.10739>

### ...COMES FIRST AND LASTS LONGEST

**Heritage sites are the first ports of call for international visitors. Only then do they progress to more popular culture\*.**

High-profile heritage attractions act as hooks attracting visitors on their first trip to a destination. Research indicates a cultural tourism life cycle, with a progression from cultural gems towards less well known attractions on repeat visits.

\*Targeting the cultural consumer by Tourist Research and Marketing for the Northern Way, 2006

### ...VISITORS HAVE DEEPER POCKETS

**Heritage tourists stay longer and spend more than their leisure counterparts. In fact, they spend between 9% and 40% more\*.**

And with over 2 million visitors paying to visit North West heritage sites and a further 8.5 million enjoying visits to museums in the region during 2006\*\*, it’s no surprise that tourist resources such as [www.industrialpowerhouse.co.uk](http://www.industrialpowerhouse.co.uk) are experiencing thousands of downloads each month.

\* Evidenced by various sources including the above.

\*\* MLA NW statistics

\*\*\* Outings with a difference – research by Morris Hargreaves and MacIntyre for Industrial Powerhouse 2006

### ...NOT JUST A PRETTY FACE

**Historic Houses contribute over £23million directly to the North West’s economy while Tatton Park alone generates over £6.6 million net spending\* from domestic and international visitors.**

\* Cheshire County Council Value and Impact Study 2006

### ...HAS THE DOMINO EFFECT

**With over 5 million visitors each and every year, Liverpool’s renowned Albert Dock is the region’s most visited free heritage destination\*.**

The wider effect of spending in the region from visitors to heritage sites is profound. For example National Museums Liverpool contributes in excess of £65 million to the North West’s economy\*\*.

TMP statistic <http://www.merseyside.org.uk/displaypage.asp?page=12>

\*\* NML Economic Impact Study <http://www.liverpoolmuseums.org.uk/about/news/newsarticle.asp?id=511>

### ...TOUCHES PEOPLE

Whatever their background, Heritage Tourism is popular with people from all walks of life.

**67% of residents in the North West consider themselves heritage tourists\*.**

As one of the most diverse areas of the UK, the North West is proud to promote the values of our shared history.

**48% of Black and Minority Ethnic residents from the region visited a heritage attraction during 2006\*.**

\* From Heritage Counts (see above) <http://www.english-heritage.org.uk/hc2006/>

# HERITAGE TOURISM – THE DETAIL

## 1.1 Provision

Historic properties account for 28% of visitor attractions in the UK<sup>1</sup> and there are an estimated 1,027 heritage businesses in the North West (2.8% of all cultural industries business units in the region)<sup>2</sup>.

There are 25,716 listed buildings in the North West, and 1,316 scheduled monuments. There are two World Heritage sites in the region, and 137 registered parks and gardens. The Historic Houses Association has 79 houses in the North West, 35 of which are open to the public. There are 24 National Trust paid admission properties in the region<sup>3</sup>.

413 Heritage Open Days were held in the North West in 2006.<sup>4</sup>

## 1.2 Economic impact

### **Investment and funding**

The cultural sector as a whole contributes an estimated £15 billion to the North West's economy<sup>5</sup>.

The heritage sector in the North West has attracted over £545 million of investment in the last 10 years, around £390 million of which has come from Heritage Lottery Fund funding. The National Trust alone invested £16 million in the North West region in 2005, and the Historic Houses Association estimate that its members contribute £23.3 million to the regional economy<sup>6</sup>. In 2005-6, English Heritage offered £6,564,000 of grants in the North West.<sup>7</sup>

### **Visitor spend**

On average, households in the North West spend 15% of their total expenditure on culture and recreation.<sup>8</sup>

In 2005, revenue generated by staying visitors in the North West (domestic and overseas) amounted to an estimated £4.4 billion, with day visitors generating a further £6.5 billion.<sup>9</sup>

A North West visitor and spending survey undertaken during 2003/4 found that average spend per visitor was £75.69 per day: £54.98 for day visitors, £76.13 for visitors staying in serviced accommodation and £44.90 for those staying in non-serviced accommodation. Visitors staying with friends or relatives spent £35.66 per day on average. The average daily spend by visitors at heritage attractions in the North West is £15.64. This breaks down as: industrial heritage = £14.52; historic houses = £22.33; historic parks = £16.54; monuments and castles = £9.18.<sup>10</sup>

Heritage attractions are as likely to encourage spend on accommodation as other tourist trips. One in seven industrial heritage visitors make an overnight stay<sup>11</sup>, compared to one in ten general tourist visitors. Around two thirds of stays are in paid-for accommodation.<sup>12</sup>

### **Staff**

There are 9,629 people employed in the heritage sector in the North West<sup>13</sup> (57% work full time and 43% part time<sup>14</sup>). The National Trust alone employs over 400 staff in the region.

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<sup>1</sup> Mintel Days Out Leisure Intelligence, April 2006

<sup>2</sup> Benchmarking Employment in the Cultural Industries in the North West 2003

<sup>3</sup> Heritage Counts 2006 North West data set. English Heritage data April 05 to March 06, Historic Houses Association data Jan to Dec 05

<sup>4</sup> Data from Heritage Open Days, 2006

<sup>5</sup> Heritage Counts 2005

<sup>6</sup> Heritage Counts 2005

<sup>7</sup> Heritage Counts 2006

<sup>8</sup> Heritage Counts 2005

<sup>9</sup> North West Region STEAM Report

<sup>10</sup> Regional Intelligence Unit NWDA Visitor & Spending survey 2003/4 NB: the survey sample had a high proportion of urban tourists which has resulted in relatively high average expenditures.

<sup>11</sup> Outings with a difference: The impact of Industrial Powerhouse, Morris Hargreaves McIntyre 2006

<sup>12</sup> North West Region STEAM Report

<sup>13</sup> Heritage Counts 2005

The National Trust also have 5,175 volunteers in the region, giving up 312,337 hours of their time. This volunteer time represents a cash contribution of £1.58 million.<sup>15</sup>

### **1.3 Visitors and visiting**

Visits to historic properties account for 19% of all days out made in the UK.<sup>16</sup>

In 2005, 25.5 million visits were made to visitor attractions in the North West.<sup>17</sup> 67% of adults in the North West have visited a designated historic environment site in the past months. Around 36% visited an historic building (national average).<sup>18</sup>

An estimated 2,165,900 paying visits were made to heritage sites in the North West in 12 months. Of these 779,000 were National Trust paying visits, 130,326 were English Heritage paying visits and 1,256,574 were visits to Historic Houses Association properties.<sup>19</sup> Estimates put the total visits to all heritage sites in the region (including unpaid visits) at ten or fifteen times this level.<sup>20</sup>

In 2005, Tatton Park was the most popular paid heritage attraction in the North West with 830,800 visitors<sup>21</sup> – a rise of 19% rise in visitors since 2003.<sup>22</sup> The most popular unpaid heritage attraction in the region was Albert Dock, with 5,942,485 visitors – a rise of 19% on 2004 figures.<sup>23</sup>

Visitors to historic environment sites tend to be older than those who take part in other cultural activities. White people from ABC1 social grades are most likely to visit.<sup>24</sup>

19% of visitors to industrial heritage sites in the North West are children. Adults visiting alone account for a fifth of all visits, with friends and family groups making 64% of visits. Organised groups make 16% of visits to industrial heritage sites in the North West.<sup>25</sup>

Most visitors to industrial heritage sites in the North West live in the region (67%), compared to just a quarter (24%) of all visitors to North West destinations<sup>26 27</sup>.

In September 2005 there were 31,714 English Heritage members in the North West: one in 200 people in the region were members. In October 2004, there were 339,000 National Trust members in the North West: one in every 17 people in the region were members.<sup>28</sup>

Around 1,500 trails are downloaded from the Industrial Powerhouse website each month.<sup>29</sup>

### **1.4 Reasons for visiting**

Some of the most recognised regional attractions and places are historic environment assets. Sites such as Liverpool's Waterfront which demonstrates the contribution of the historic environment to world class regeneration initiatives are crucial for showcasing the region. Many of the iconic images of the North West,

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<sup>14</sup> Benchmarking Employment in the Cultural Industries in the North West 2003

<sup>15</sup> More Than A Pretty Place: National Trust in the North West 2005 (value of volunteer hours calculated at £5.05 / hour)

<sup>16</sup> Mintel Days Out Leisure Intelligence, April 2006

<sup>17</sup> Visit Britain, Survey of Visits to Visitor Attractions 2005

<sup>18</sup> DCMS Taking Part third quarter regional results, in Heritage Counts North West Data Set, 2006.

<sup>19</sup> Heritage Counts 2006 North West data set. English Heritage data April 05 to March 06, Historic Houses Association data Jan to Dec 05

<sup>20</sup> The Cultural Strategy for England's North West 2001

<sup>21</sup> Regional Intelligence Unit, NWDA: Major Attractions in the North West 2005

<sup>22</sup> Mintel Days Out Leisure Intelligence, April 2006

<sup>23</sup> Regional Intelligence Unit, NWDA: Major Attractions in the North West 2005

<sup>24</sup> DCMS Taking Part third quarter data July 2006

<sup>25</sup> Outings with a difference: The impact of Industrial Powerhouse, Morris Hargreaves McIntyre 2006

<sup>26</sup> Op cit

<sup>27</sup> UK Tourism Survey 2004 – North West data

<sup>28</sup> Heritage Counts 2006 North West data set. English Heritage data April 05 to March 06, Historic Houses Association data Jan to Dec 05

<sup>29</sup> Outings with a difference: The impact of Industrial Powerhouse, Morris Hargreaves McIntyre 2006

including Liverpool's Waterfront Blackpool Tower and the Rows of Chester are valued by people within the region and recognised by millions outside the region as an integral part of its identity.<sup>30</sup>

53% of visitors to historic environment sites name 'personal enjoyment / relaxation' as their main reason for visiting.<sup>31</sup> 65% of visitors to industrial heritage sites in the region said they were visiting to find out about the North West's industrial past.<sup>32</sup> There are high levels of interest in history and heritage. Nine in ten museum and gallery visitors are particularly interested in historical subjects in museums and galleries.<sup>33</sup> Groups visiting destinations in the region are particularly interested in historic themes.<sup>34</sup>

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<sup>30</sup> The North West's Historic Environment: Making It Count 2003

<sup>31</sup> DCMS Taking Part third quarter data July 2006

<sup>32</sup> Outings with a difference: The impact of Industrial Powerhouse, Morris Hargreaves McIntyre 2006

<sup>33</sup> MORI Visits to Museums and Galleries 2004, MLA, 2005

<sup>34</sup> Marketing Manchester Group Travel Research, QA Research, September 2006