



Creative Industries in Historic Buildings and Environments

SUMMARY REPORT
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PREPARED FOR HISTORIC ENGLAND

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1 INTRODUCTION

The aim of this study is to examine the role of historic parts of towns and cities in nurturing groups of organisations that are involved in creative industries.

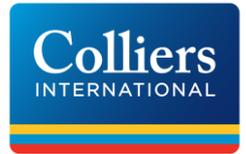
It has been produced in parallel with another study that has assessed all commercial uses of listed buildings in the centres of 55 cities and towns in England.

It focuses on companies that are in nine categories of creative industry defined by the Department for Digital, Culture, Media and Sport (DCMS).

The research has had the following elements:

- The number and nature of creative industries in conservation areas has been analysed using data from Companies House. Section 3 describes the process. It resulted in records for c.35,000 companies in creative industries in 9,600 conservation areas. This probably is less than half the actual number of creative industry companies in conservation areas because many companies are registered with accountants rather than at their trading premises, the data only includes limited companies,¹ and does not include branches of companies. It is most useful, therefore, in making comparisons between places rather than providing absolute numbers. The proportion of these businesses occupying listed buildings has been analysed by matching addresses from Companies House with address data from a schedule of listed buildings used for commercial purposes provided by Historic England. Detailed analysis has been done using the Top 300 conservation areas by number of creative organisations. They are only 3% of conservation areas, 8.5% by area, but account for over 50% of companies in creative industries.
- Twelve conservation areas that have clusters of creative industries have been examined in detail. This includes an examination of the history of the area and key interventions made that might have influenced the emergence of creative industries.
- Interviews with three development companies that have experience of converting historic buildings to workspace targeted at creative industries: one specialises in urban regeneration, one specialises in converting former office and industrial buildings to workspace and residential, the third specialises in providing space for artists.
- An online survey emailed to 320 directors of creative industry companies in the case study areas. Only 19 responses were received, unfortunately, despite a reminder.
- Examining use of historic buildings in case study areas using CoStar Focus and Experian Radius. They are commercial property databases with information about individual properties from the land registry and other sources. It includes data such as owner, date of sale, major developments, occupiers, length of lease, rent, and average rents in the area. It is not comprehensive, however. Some conservation areas were excluded because there was no information about historic buildings readily available or, for Norwich and Cheltenham, the conservation areas are too big and diverse to make the analysis useful.
- Socio economic profiling of the residents of the case study areas using the Mosaic system.

¹ i.e. excludes sole traders and other types of organisation.



Vejuna Zalalyte and Clare Clough did the data processing; David Geddes did analysis. Michael Copeman, a historian specialising in historic buildings, did the historical research, with advice and assistance from Paul Drury of Drury McPherson Partnership.

The results of the work are contained in four reports:

This report explains the methodology and summarises the results.

Three accompanying reports contain:

- Data Analysis.
- Case Studies.
- Developer Perspective.

2 BACKGROUND

2.1 CREATIVE INDUSTRIES

The DCMS definition of creative industries is grouped into nine categories: Advertising and Marketing; Architecture; Crafts; Design; Film, TV, Video, Radio, Photography; IT, Software and Computer Services; Publishing; Museums, Galleries, Libraries; Music, Performing and Visual Arts.

The Office for National Statistics (ONS) produces data on the contribution of DCMS sectors to the UK economy. The latest was produced in August 2016.² It has information on gross value added (GVA) for years 2010 - 2015, exports of services (2010 - 2014), imports of services (2013 - 2014) and number of enterprises (2008 - 2014).³ It does not include estimates for the voluntary, community service and social enterprise sector.

The total GVA of DCMS sectors in 2015 is estimated to be £221bn, 13.3% of UK GVA. GVA of creative industries is estimated at c.£87 bn,⁴ c.38% of the DCMS sectors and c.5.3% of UK GVA.

Figure 1 shows the sector has been growing fast, its GVA increasing by more than a third between 2010 and 2015, twice the rate of the UK economy.

Figure 1: Creative Industries GVA, Exports, Imports and Number of Enterprises

	2010	2011	2012	2013	2014	2015	Last vs First Year	% of UK
GVA (bn)	65.2	69.4	73	77.9	81.6	87.4	34%	5.3%
Exports	5.1	4.6	4.9	4.8	5.4		6%	9.1%
Imports				7.9	8.7			6.6%
Enterprises (000s)	193.8	206.7	219.3	236.1	248.8		28%	12.0%
GVA per enterprise:	£336,429	£315,433	£297,310	£276,154	£262,058			

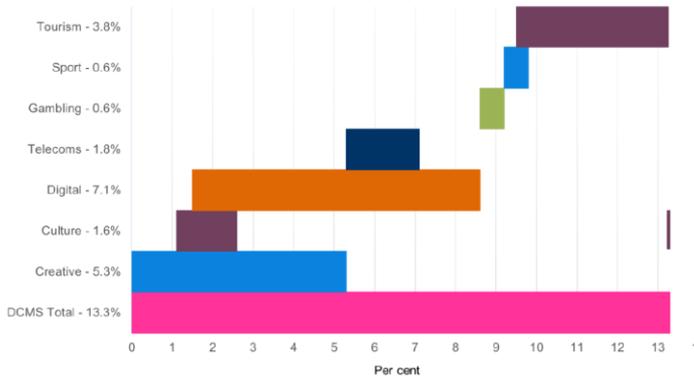
Figure 2 shows the share of GVA of different sectors DCMS leads on and how they overlap.

² DCMS Sectors Economic Estimates. Data is in current prices, not adjusted for inflation.

³ This is derived from the Annual Business Survey (ABS), which is based on UK trading businesses registered for VAT and / or PAYE.

⁴ The methodology for calculating Creative Industries is said to be “experimental”.

Figure 2: GVA overlaps in different DCMS sectors, 2015



Source: DCMS Sectors Economic Estimates, DCMS 2016

Figure 3 shows that the sector makes a positive contribution of c.£11 bn annually to the national balance of payments, exporting more than twice what it imports.

Figure 3: Creative Industries Balance of Payments

	Exports		Imports		Balance	
	£ million	%	£ million	%	£ million	%
Europe	11,356	58%	4,821	55%	6,535	60%
America	5,526	28%	2,408	28%	3,118	28%
Asia	2,039	10%	1,032	12%	1,007	9%
Africa	407	2%	97	1%	310	3%
Australasia	356	2%	333	4%	23	0%
World	19,684	100%	8,707	100%	10,977	100%

About 1.9 million people are estimated to be employed in creative industries in the UK in 2015⁵, which implies about 7.3 employees per organisation.⁶

Figure 4 shows the sector is dominated by small enterprises⁷, with about 90% having four or less employees.

Figure 4: Size of Creative Industries Enterprises

No of Employees	% of total
0 - 4	89.0%
5 - 9	5.7%
10 - 49	4.4%
50 - 249	0.8%
250+	0.2%

Nesta produced a report in 2016 into the pattern of creative industries across Britain.⁸ It identified 47 “creative clusters”. It noted the tendency of creative industries to concentrate in certain locations.

⁵ Creative Industries: Focus on Employment. DCMS. June 2016.

⁶ 1.9 million divided by c.260,000 enterprises.

⁷ Data about enterprises originates from the Inter-Departmental Business Register, which includes sole-proprietors.

⁸ The Geography of Creativity in the UK, Juan Mateos-Garcia and Hasan Bakhshi, July 2016. Their analysis uses data from the Office for National Statistic’s Business Structure Database (BSD) for Travel to Work Areas (ONS defined areas based on information on commuting patterns from the 2011 census). BSD

2.2 WORK SPACE PROVISION

The market for work space, especially that suitable for small and fast-growing businesses, has been undergoing rapid change.

This has been led by operators such as WeWork and The Office Group, which have been acquiring large amounts of space in London and the regional cities and letting it on flexible terms that allow companies and individuals to easily change the amount of space they have or move elsewhere.

Data from Savills shows that the amount of office space in London taken by providers of flexible office operators increased from 160,000 sq ft in 2011 to 2.1 million sq ft in 2017, which represented 18% of work space let in London in 2017.

Recent research⁹ found that the number of flexible workspace centres in the UK grew by 10% in 2017 to 5,320. Independent operators account for 83%. Many small operators are catering for niche segments such as specialist tech start-up and women-only.

Another significant trend, especially in London but also in other cities, is “office campuses”. These are large workspace developments, with multiple buildings, that are constructed with a view to creating a strong sense of place and personality, one that is attractive to people who might potentially work there. They give special attention to pseudo-public realm and ground-floor space, both being privately-owned and managed and carefully curated. Well-known examples are Kings Cross, Paddington Central and White City, but there are many others, such as the 650,000 sq ft Republic development of the East India Dock in East London.¹⁰

Heritage assets are often a central part in this strategy. Coal Drops Yard, a shopping and leisure street converted from vaulted spaces built in the 1850s for receiving and sorting coal as it arrived from the north of England by train, is scheduled to open in October 2018 as a centrepiece of the Kings Cross campus. The restoration has been designed by Heatherwick Studio and is intended for occupation by independents and niche brands that appeal to the creative types that are expected to work there.

3 METHODOLOGY

3.1 DEFINITION OF CREATIVE INDUSTRIES

It is not possible to make a clear distinction between whether a type of business is “creative” or not. The matter is muddled by the many people doing creative work in businesses that are not considered to be creative in totality. Much work has been done on issues relating to this on behalf of the Department for Digital, Culture, Media and Sport (DCMS) and organisations such as Nesta.¹¹ This research simply accepts the DCMS definition.

contains a small number of variables for almost all business organisations in the UK. It is derived primarily from the Inter-Departmental Business Register (IDBR), a live register of data collected by HM Revenue and Customs via VAT and Pay As You Earn (PAYE) records. IDBR data is complimented with data from ONS business surveys. A business will appear if it is liable for VAT and / or has at least one member of staff registered for PAYE. It was estimated in 2004 that businesses listed on IDBR accounted for 99% of UK economic activity. The Nesta research excludes areas where there are a small number of creative businesses because of restrictions on being able to identify specific businesses on the database. It does not include Museum, Libraries and Crafts.

⁹ The Evolution of Flexible Workspace, The Instant Group, June 2018.

¹⁰ By Trilogy Real Estate.

¹¹ A charitable foundation that promotes innovation.

Creative Industries is one of five sectors that DCMS covers. The others are Cultural Sector; Digital Sector; Gambling; Sport; Telecoms; and Tourism. There is overlap between them: some types of organisation, in other words, are included in more than one sector.

DCMS defines the following SIC codes as being creative industries, grouped under 9 categories:

1. Advertising and Marketing – SIC codes 7021, 7311, 7312
2. Architecture - 7111
3. Crafts - 3212
4. Design - 741
5. Film, TV, Video, Radio, Photography - 5911-14, 601-2, 742
6. IT, Software and Computer Services - 5821, 5829, 6201-02
7. Publishing - 5811-14, 5819, 743
8. Museums, Galleries, Libraries - 9101-02
9. Music, Performing and Visual Arts - 592, 8552, 9001-04

3.2 ANALYSIS PROCESS

Historic England (HE) provided names and co-ordinates for conservation areas in England. There are about 9,455.¹²

HE provided a schedule of spaces in listed buildings that are in commercial use.¹³ It has 83,798 entries. There are multiple entries for many listed buildings (i.e. the ground and first floor of the same building might appear twice).

They were allocated to the conservation areas using the Colliers GIS system. This showed 35,354 unique listed buildings used for commercial purposes in conservation areas.

Data was obtained from Companies House of all companies registered in England classified under the SIC codes defined by DCMS as being creative industries.

There are 386,971 records,¹⁴ 261,109 excluding companies which are dormant or have not filed accounts. That is consistent with the number of enterprises quoted by DCMS.¹⁵

The company records in each of the 9 creative industry categories were assigned to each conservation area. There were 67,478 active companies excluding those recorded as being dormant and not having filed accounts.¹⁶ This suggests that about 26% of enterprises involved in creative industries are in conservation areas.

¹² Some have not been notified to HE by the relevant local authority.

¹³ This list has been created by HE going through the database of listed structures and marking those which appeared to be used for commercial purposes. This will inevitably be imprecise given that there are about 500,000 listed structures and it can be difficult to determine what purpose they are used for.

¹⁴ For England.

¹⁵ Which estimated about 248,000 in Britain in 2014. The number will have expanded since then.

¹⁶ i.e. excluding those that are dormant or have not filed accounts. There are 102,741 entries in total.

Analysis of data in a selection of conservation areas showed it was distorted by many companies using the address of an accountant, lawyer or company registration service as their registered address. It is most likely to be an accountant. There are some instances of large numbers being registered to a company registration service.

A list of accountants was obtained from Companies House. The addresses were matched with creative industries companies. Creative industry organisations that shared an address with an accountant were removed from the list.

All other instances where there were more than 10 creative industry companies registered at a single address were checked to make sure they were where creative industry organisations were co-locating.

This resulted in a list of 34,754 creative industry companies in conservation areas, approximately half the number of creative industry organisations registered in conservation areas.

A large proportion of companies that are registered with an accountant, lawyer or company registration service¹⁷ located in a conservation area will also operate in a conservation area. Other creative industries companies that are registered with an accountant, lawyer or company registration service outside a conservation area will operate in a conservation area.

The number of offices or studios occupied by creative industries will also be understated because the data does not include branch offices. Each company is, therefore, included just once, no matter how many branches it has.

The evidence presented here therefore represents **a sample** of creative industries in conservation areas.

The top 300 conservation areas, by number of creative industries, were separated for more detailed analysis. They account for 3% of all conservation areas in England, 8.5% by area, and 31% of the listed buildings in conservation areas.

The list of creative industries in each conservation area was matched with the schedule of listed buildings in listed buildings. This required putting the address records into the same format.

3.3 IDBR

It was hoped that a better idea of the number of creative industry enterprises plus their turnover and employees might be obtained from the Inter-Departmental Business Register (IDBR). The IDBR data is only, however, available at Middle Super Output Areas (MSOAs) which tend to be larger than conservation areas and can contain more than 1 conservation area. It was therefore not possible to identify conservation areas in this dataset. The level of employment by area and turnover by area is, however, used to estimate total employment in conservation areas and the business turnover using the MSOA creative industries data.

¹⁷ And, therefore, removed from the list.

Figure 5: Comparison of number of enterprises in conservation areas according to Companies House (only likely to represent less than half of the actual number, as explained above) and IDBR

	No. of Enterprises			IDBR Data	
	Amended Companies House	IDBR	Companies House as % of IDBR	Employment	Turnover (£'000s)
Advertising & Marketing	3,439	19,780	17%	136,475	29,304,512
Architecture	2,468	12,090	20%	60,667	5,996,614
Crafts	269	1,025	26%	4,124	631,276
Design	2,025	17,830	11%	49,283	5,453,745
Film, TV, video, radio, photography	5,422	26,200	21%	125,979	31,288,021
IT, Software & Computer Services	11,762	100,470	12%	380,422	55,686,016
Museums, Galleries, Libraries	388	735	53%	19,969	625,300
Music, Performing and Visual Arts	6,305	25,675	25%	89,089	10,603,851
Publishing	2,676	8,395	32%	117,737	15,937,187
Total	34,754	212,205	16%	983,745	155,526,522

4 SUMMARY

That sector of the economy has been growing fast. It now forms about 13% of the UK economy and runs a balance of payments surplus of c.£12 billion.

The main part of the research assesses the number and nature of companies in the 9,500 conservation areas¹⁸ in England known to Historic England, with focus on the top 300 by number of creative industries, which account for about half of all creative industry companies in conservation areas. It has used data from Companies House, grouped into the nine types of creative industry¹⁹.

Some key findings are:

- c.26% of all companies involved in creative industries are in conservation areas. The proportion accounted for by conservation areas is higher for all types other than IT related.

Figure 6: % of Creative Industry companies by type registered in conservation areas

Museums, Galleries, Libraries	38%
Crafts	36%
Music, Performing and Visual Arts	33%
Advertising & Marketing	31%
Publishing	31%
Film, TV, video, radio, photography	31%
Architecture	29%
Design	26%
Total:	26%
IT, Software and Computer Services	20%

¹⁸ Local planning authorities are obliged to designate as CAs any areas of special architectural or historic interest, the character and appearance of which it is desirable to preserve or enhance.

¹⁹ A different source of data was used for the study of business activities in town and city centres. It is PointX, a database of all activities in buildings that is maintained by ONS. It does not classify uses by SIC code, however, so it is not possible to match it exactly with the DCMS definition of creative industries. Companies House data, by contrast, can be matched exactly.

- This is c.67,000 companies, c.460,000 - 528,000 people working in them²⁰, and GVA of c.£22 - £25 billion.
- Figure 7 shows the nature of the companies, comparing to England as a whole. IT, Software and Computer Services form the largest proportion, even though not as high a proportion as for the whole country.

Figure 7: Nature of creative industry companies in conservation areas

	England		Conservation Areas		England minus CAs	
	No	%	No	%	No	%
IT, Software and Computer Services	125,495	48%	25,008	37%	100,487	52%
Music, Performing and Visual Arts	34,776	13%	11,374	17%	23,402	12%
Film, TV, video, radio, photography	34,078	13%	10,624	16%	23,454	12%
Advertising & Marketing	20,524	8%	6,427	10%	14,097	7%
Publishing	15,022	6%	4,693	7%	10,329	5%
Architecture	13,936	5%	4,086	6%	9,850	5%
Design	14,910	6%	3,905	6%	11,005	6%
Museums, Galleries, Libraries	1,202	0%	452	1%	750	0%
Crafts	1,165	0%	420	1%	745	0%
Total:	261,108	100%	66,989	100%	194,119	100%

- c.75% of all companies involved in creative industries are in the 20% of conservation areas that form the greatest clusters of creative industries.
- London accounts for two thirds of the creative industry companies located in conservation areas.
- Bristol, Bath, and Brighton and Hove, form notable clusters by size outside London. There are also dense creative industry clusters in Manchester and Liverpool.
- IT related creative industry is the most dispersed amongst conservation areas.²¹ Other creative industry sectors are more concentrated in certain conservation areas, Crafts and Film especially so.
- There is strong propensity for businesses of similar type to cluster in conservation areas. There are, for example, in London, dominant clusters of media related businesses in Charlotte Street, design / architecture related businesses in Old Bethnal Green Road, IT related businesses in Moorfields, craft-related businesses in Hatton Garden, publishing in Haymarket, and performing arts in Chinatown / Covent Garden / Seven Dials.
- There are, outside London, notable design-orientated clusters in the Harrogate and Royal Leamington Spa conservation areas. Others include: Advertising and Marketing in conservation areas in Manchester, Leeds and Cheltenham; Architecture in conservation areas in Cambridge and Newcastle; Film etc in Bristol, London and Nottingham; Music etc in Sheffield, Liverpool and Brighton and Hove.
- Less than 10% of creative industry organisations in conservation areas are located in listed buildings, although there are a few places where the proportion is high.
- There is strong correlation, however, between density of listed buildings and density of creative industries in conservation areas, albeit this is much to do with the density of creative industries and listed buildings in central London.

²⁰ Based on DCMS estimates. The reason for the range is that, when the jobs are calculated per sector and added, they come to 7.9 jobs per company, representing c.528,000 jobs. DCMS, however, estimates 6.9 jobs per company in total, which would represent about 460,000 jobs. This also affects the GVA estimate.

²¹ Other than Museums, Galleries and Libraries.

The study has produced maps of central London and the eight “core cities” (Birmingham, Bristol, Leeds, Liverpool, Manchester, Newcastle-upon-Tyne, Nottingham, and Sheffield) showing their conservation areas and the location of creative industry companies. It shows that there are visible concentrations of creative industries in conservation areas.

The study has examined the situation in detail in twelve conservation areas, four in London (Bermondsey Street, Seven Dials, South Shoreditch and Old Bethnal Green) and one each in the other eight regions (Central Cheltenham; City Centre Norwich; Cultural Industries Quarter, Sheffield; Digbeth-Deritend, Birmingham; Friar Gate, Derby; Ramsgate; Lower Ouseburn Valley, Newcastle upon Tyne; Smithfield, Manchester). Most of them currently have large clusters of creative industry companies; two or three have more potential as creative industry hubs than current reality.

This work showed:

- There is a division between conservation areas where creative industries gathered largely as a result of market forces, and those where the public sector had to play a more active role in helping the cluster to emerge. The four London case studies all represent circumstances where the market has been the main driver. Assessment of rents, which are the key determinant of viability, in a selection of the case study areas shows a chasm between the London areas and the regions. It explains why the market operates without need for much public sector intervention there; private sector developers are able to make a profit without assistance.
- The public sector did ultimately play a major role in the London areas by preventing demolition of historic buildings and by investment in public realm. Campaigning by local activists in the 1970s and the 1980s played a critical role in prompting them to do so and securing the survival of old buildings in locations, like South Shoreditch and Bermondsey Street, that now form intense groupings of creative industries and have, therefore, played such an important role in establishing London’s image as one of the most vibrant and creative cities in the world.
- Large creative industry clusters have sometimes resulted from the work of determined entrepreneurs that have realised the potential of large former industrial or warehouse buildings as creative industry hubs. The Custard Factory in Birmingham is a primary example from the case studies in the report. Other examples nationally include the Tobacco Factory in Bristol, Biscuit Factory in Ouseburn, Newcastle; Tea Building in Shoreditch.
- Investment in public realm and restoring historic buildings is a vital part of creating the right ambience in historic townscapes. The Heritage Lottery Fund’s Townscape Heritage programme has played an important part in that for the past two decades.

A survey of creative industry companies that are based in the case study areas found that the primary reason for them being located there was “ambience of the area”. That ultimately explains the crucial impact which heritage has in stimulating creative industries.

Three developers, of different type but each with much experience of developing historic buildings for use by creative industries, were interviewed. Conclusions drawn from their observations, combined with the research, are:

- There has, in recent years, been a great increase in the amount of space for co-working that can be let on a flexible basis, especially in London and the main regional cities. Old buildings are not now central to the provision of such space, although they may well have the potential to deliver it.

- The conventional view that companies in the creative industries are not able to afford market rents is not necessarily correct (although, obviously, affordability is always an issue, as in any commercial activity). The research shows that the greatest concentrations of creative industries are in areas with highest rent. Many companies in creative industries are young and ambitious. They require work space that is of high quality, providing comfortable conditions and super-fast broadband. They like to be close to the amenities of city centres and transport hubs. They often choose space in historic buildings restored with panache because it fits their self-image and the image they wish to project to customers and potential staff.
- There is a sub-set of creative industries, artists and makers, for which affordability both of space to work and place to live is a critical issue. Art is unlike other commercial activities. Artists tend to go straight from college into self-employment and most have low earnings. Acme, a charity interviewed, has specialised for over 40 years in providing affordable space for artists in London. They, in past times, could acquire old buildings at low cost and convert them to studios, normally with assistance of grant funding. This is no longer possible in London. Most of their projects now involve provision of affordable space in new buildings that are part of residential-orientated schemes and are required by local planning authorities to compensate for loss of employment space at the site. There is large demand for studio space, especially in London, and it remains a major potential use of historic buildings outside London, albeit typically requiring grant funding to make it viable.
- It is increasingly difficult, in cities, to find historic buildings with character to convert to work space, partly because most have now been converted and partly because of competition from residential developers, residential currently providing higher development value.

The research has not, however, shown a discernible pattern of historic buildings currently used for creative industries being taken over and redeveloped for residential use.²²

Some conclusions that can be drawn from the work are:

- Creative industries are a major economic activity, with potential to underpin regeneration work in many historic townscapes, because of strong affinities between them that range from physical (the suitability of old buildings for such uses) to intangible (ambience, cultural and historic associations).
- There is demand and potentially a good supply of affordable space in places like Ramsgate (one of the case studies where it seems most obviously true) that is no longer available in London, as well as the sort of ambience that is attractive to creative industries. The cost, which is similar everywhere, of bringing larger and more problematic historic buildings into new uses in areas with lower property values is likely to require subsidy.
- There has been a significant reduction in the availability of grant aid to support the reuse of historic buildings since c.2000. HLF's investment in townscape heritage has played a key role in this and is likely to have had huge benefits. HLF's Heritage Enterprise Fund was targeted at helping with this, challenging assistance to developers willing to take on difficult buildings. The interviews for this study suggest that it is not perceived as a mainstream option by developers.
- The challenge is only partly about using historic buildings themselves for creative industries. It is more about creating an entire environment that is conducive to the types of individuals and organisations that work in creative industries.

²² The full impact of Town and Country Planning (General Permitted Development) (England) Order 2015 (GPDO) allowing the conversion of offices to residential without planning permission has not been felt in many areas, which are exempt from its provisions until 2019.



- It is now unusual for historic buildings or areas to be subject to wholesale redevelopment, but the emergence of buzzing, new, often mixed-use, creative hubs may now be at risk from monocultural residential or retail developments, driven by the greater financial returns and the increasing dominance of private rather than public investment.
- The historic trends revealed by the research suggest that prioritising short-term economic development over the conservation of historic environments can be a costly mistake, resulting in the loss of potential long-term economic assets as well as irreplaceable heritage assets.

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