



HERITAGE COUNTS ENGLAND
TENTH ANNIVERSARY EDITION **2012**



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INTRODUCTION

The year 2012 marks the 10th anniversary of Heritage Counts. Ten years that have seen significant changes in the world surrounding England's heritage and those who use and care for it. When Heritage Counts was first published in 2002 the economy had been growing for over 10 years and only half the population went online. The world in 2012 is very different. As such, the 10th edition of Heritage Counts provides an opportunity to take stock of how heritage has fared in these changing times and where it might be going in future.

A consequence of the economic situation since 2006 has been reduced public funding, and this is reflected in reduced numbers of historic environment staff in local authorities and the grant in aid that English Heritage receives. As a result we have seen falling levels of front-line expertise in the historic environment around the country, which is of great concern to me. Resources aside, the framework within which the planning system operates is changing substantially through the NPPF and localism agenda. The sector has actively engaged with this and continues to make a positive contribution to the improvement of policy in an area which is still in flux.

In these circumstances it has never been more important to champion heritage's vital role in the economy; indeed, participation in heritage has never been higher. In 2012 almost three quarters of the adult population visited the historic environment: the highest level ever recorded. Membership and friends scheme numbers have also increased continually for the Historic Houses Association, English Heritage and the National Trust over the past 10 years.

A time of change is a time for new solutions, and Heritage Counts 2012 looks to the future with research on the theme of 'resilience': how organisations and individuals involved in heritage can adapt to a changing environment.

As identified by the Work Foundation study for the Heritage Lottery Fund, there are several trends creating new opportunities for those involved in heritage ranging from the role of urban areas in growth, to the knowledge economy and green agenda. At a more local level, Heritage Counts also examines how the organisations involved in heritage have adapted to cope with change. It is inspiring to see the innovative ways in which people have adapted to changing circumstances. It's this kind of thinking that is so important for the future and I encourage you to read the research for inspiration. For the full set of Heritage Counts indicators, plus regional summaries and the research reports, please visit www.heritagecounts.org.uk.

I would very much like to thank all the partners and organisations involved in Heritage Counts that have contributed to making it such a success over the past 10 years.



Baroness Andrews OBE
Chair, English Heritage

01

HERITAGE AND RESILIENCE RESEARCH

Introduction

This year's *Heritage Counts* comes as the effects of the financial crisis are still being felt across the country. Those involved with heritage have had to deal with a range of issues – from declining central and local government funding, to consumers spending less and a tougher environment for raising funding from donors. These have affected the private individuals that look after the majority of historic buildings, and the organisations – large and small, public, private and charitable – that manage and care for the historic environment.

The heritage sector is responding to these challenges through, for example, The Heritage Alliance's work on philanthropy to diversify funding streams, and the Heritage Lottery Fund's support for capacity (and endowments). Meanwhile, increasing public participation remains key. In 2011/12 national participation in heritage reached its highest recorded level at almost three-quarters of the adult population.

In this context *Heritage Counts* takes as its theme 'resilience': how the organisations and people involved with heritage are able to adapt, anticipate and respond to changing circumstances. The topic is explored through two pieces of research.

The first, by the Work Foundation takes the broad view, with a new look at how heritage can contribute to the resilience of the UK economy and where the sector can best look for new opportunities in income generation.

The second, by BOP Consulting, examines the concept of organisational resilience and how those involved with heritage are able to better deal with changing conditions. This is based on interviews with a number of organisations.

These are supplemented by research on the activities of Building Preservation Trusts (BPTs) and how builders specialising in historic buildings are faring in the current economic conditions, and an example of how churches have been adapted to make them more resilient.

This work is covered in parts 1, 2 and 3 of this section respectively.

KEY FINDINGS

The Work Foundation research considered that there are long-term opportunities for the heritage sector and its contribution to economic growth arising from:

Consumers' increasing demand for a wider range of experiences This is creating demand for a new type of heritage experience, which opens up fresh commercial opportunities.

The growth in interest in heritage worldwide This is resulting in rising international demand for skills in preserving heritage: an area that is a national strength.

Heritage's central role in urban areas Given the growing recognition of urban areas' part in generating economic activity, the importance of heritage in providing attractive urban spaces for work and leisure is increasing.

The green/low carbon agenda This core policy agenda, with its focus on re-using buildings, provides opportunities for the heritage sector given its expertise on this topic.

01 Economic roles relevant to the heritage sector



The research into the factors that help make organisations engaged with heritage more resilient found the following to be important:

Their focus on developing people Resilient organisations think about their relationship with volunteers and supporters, ensuring clear communication across the organisation, while identifying the right people at board level.

Their approach to managing historic assets They recognise the need to make best commercial use of their assets, and balance the demands of heritage conservation and public engagement.

Their strategic vision Resilient organisations continually adapt to smaller-scale changes, while anticipating the future. They are visible and connected, and pioneer new approaches.

1 HERITAGE AND RESILIENCE IN THE UK ECONOMY

In the early years of the financial crisis the Heritage Lottery Fund (HLF) commissioned the Work Foundation to do some thinking on the future of heritage. This work considered the nature of economic change in the UK and examined the role of heritage¹ in this.

The starting point for this work was the Foundation's view of the forces affecting all sectors of the UK economy, characterised as the trend towards an increasingly knowledge-based economy. This is an economy in which 'the generation and exploitation of knowledge plays the predominant part in the creation of wealth', with growth driven by rising demand from more sophisticated, diverse, and demanding consumers. Even before the financial crisis, over half the economic activity and employment in the UK was in knowledge-intensive sectors and this trend is considered likely to accelerate.

The other defining characteristic of the economy over the next decade, and beyond, is environmental resource constraints due to climate change, commodity scarcity and greater worldwide demand for resources.

Within this context the Work Foundation identified five economic roles as the most relevant for the heritage sector as shown in Fig. 01. These are now discussed in turn.

The 'experiential' consumer economy

Consumer tastes change as societies become more educated, with demand switching to higher value-added goods and services. There are two ways that this relates to heritage.

The first is that the value of successful brands is increasingly found in the meaning of products, rather than their physical attributes. For example, the relationship with consumers is increasingly important for design products, arts and crafts, food and digital media that want to trade on their authenticity. This authenticity comes from consumers' knowledge and understanding of products' connection with place or local expertise in production and design.

The second more obvious 'service' offered by the organisations and individuals involved in heritage is the management of the array of destinations, parks, historic buildings, museums and landscapes that attract millions of visitors each year. Tourist holidays and traditional day trips are not the only ways in which consumer demand for heritage 'experience' is growing. The Work Foundation considered that there is a large and increasing desire to learn about heritage, which is creating opportunities for businesses that enable people to participate in cultural life at a range of different levels, from attendance at events and talks to the more engaged commitment of learning and education. The average household expenditure on recreation and culture grew from 6.3% of income in 1988 to 14.3% in 2010 – equivalent to an extra £19 billion of spending per year². Organisations involved in heritage have benefited from this expanding consumer market and should continue to do so.

¹ Work Foundation, 2010: Heritage in the 2020 Knowledge Economy

² ONS data on household income and expenditure

Challenges for the sector identified by the Work Foundation

The challenges for the heritage sector are to use these opportunities to generate more revenue from consumers who are willing to pay to visit, learn about and participate in heritage activities, and to diversify heritage's audience so that there are more of these people. Both will enhance the sector's financial sustainability. Crucial here will be the sector's use of the latest in design, marketing/branding and communication technologies – especially the use and application of digital technology. The past may stay the same, but its interpretation and communication do not.

Growing business demand for heritage

It is not just consumers that have a growing interest in what heritage organisations produce and provide. In a 'knowledge economy' there is the possibility of a growing demand for heritage from businesses as well. There may be benefits in organisations involved with heritage giving further thought to their role as supplier of some of the 'intermediary' goods and services that support sectors and businesses.

Heritage and scientific innovation

The Work Foundation considered there were two opportunities here:

Firstly, 'scientific heritage' is the heritage of our scientific discovery and the knowledge accumulated over centuries of research that has been put to industrial use. Some of this knowledge resides inside private companies, as well as in universities, but parts of it reside in the institutions of the heritage sector. In a knowledge economy, industry increasingly relies on the management of scientific collections by heritage organisations, and the access to knowledge that they provide.

The second opportunity is different, but equally important. The Work Foundation noted that 'Heritage science' – how we conserve, understand and value heritage – is a national strength, with world class expertise based in many institutions. Heritage is a growing industry globally, with increasing investment by both public and private bodies worldwide. This may provide opportunities for institutions with skills in these areas to increase export earnings.

The creative and cultural sector

The creative and cultural economy is expected to be one of the main pillars of economic recovery, and heritage is frequently part of the supporting infrastructure for this sector. In particular, the intellectual property held by some heritage organisations can provide a growing income for those organisations that can find ways of exploiting links with creative practitioners and cultural businesses.

Challenges for the sector identified by the Work Foundation

In 2012 the House of Lords followed up its 2006 report, which argued that the fragmented and under-valued nature of scientific heritage meant Britain's world class status was slipping away.³ It acknowledged that steps to establish a national scientific heritage strategy have been taken, but noted that these continue to need to be consolidated in centres of research excellence.

While the relevance of the heritage sector for the creative and cultural economy is apparent, relatively little is known about how the two areas of activity relate to each other. The links and mutually beneficial spill-overs between the two are poorly understood. In supporting the development of these connections, the first challenge is to identify them, and better understand how they operate.

City development and anchor institutions

Urban centres are widely considered the motor of innovation and growth in a modern economy. The link between the heritage of urban areas and their social and economic development has been the subject of recent research e.g. by Donovan Rypkema in the US, and the work featured in the 2010 *Heritage Counts*. The Work Foundation identified a number of ways in which historic buildings can support cities in their development.

[A] Cities will continue to need the range of business space and properties that can be provided by a mix of new and historic built environments. Within a climate of constrained public expenditure and limited private sector investment, heritage-led regeneration has been found to offer a cost effective solution to development needs, while strengthening a local area's distinctive identity and attractiveness.⁴

[B] Cities have to be distinctive to attract businesses and workers. This covers not just the architectural fabric of a place, but also its wider cultural offer and identity that is promoted through local heritage.

[C] Many heritage organisations are 'anchor institutions' – the civic, cultural and intellectual institutions that help to make places resilient. Anchor institutions can't move, and so constitute long term assets that attract wealth and talent to an area, around which local economic regeneration can be built.

[D] The concept of distinctive economic development argues that cities should not all try to do the same things, but root economic development in their traditional industrial heritage. There is evidence from recent city regenerations that successful development of knowledge economies cannot be divorced from the industrial and economic history of these places.⁵

Forthcoming joint research by English Heritage and the Heritage Lottery Fund on the uses of listed buildings will provide the first systematic analysis of the role of listed buildings in commercial activity in England.

Challenges for the sector identified by the Work Foundation

Fostering greater collective local identity: Heritage institutions in many places still lack collective identity and can perceive other heritage institutions as competitors rather than potential partners. In addition, the diversity of activities within heritage is such that some heritage institutions do not see themselves as part of a 'sector'.

Knowledge transfer across heritage institutions and localities: Individual heritage institutions are relatively disparate and traditionally there have been no formal structures in place for knowledge transfer and lesson learning between organisations and people, although informal networks are frequently strong. The idea of 'anchor institutions' provides a powerful tool for heritage organisations to use to think differently about their role.

New markets in a low carbon economy

A key priority for public policy remains the transition to a low carbon economy. The Work Foundation considered heritage had three clear links to this development.

The first is well known: how we re-use existing buildings, and how our building stock is to be refurbished for greater energy efficiency. There continue to be opportunities for the heritage sector to lead the way in advocating the re-use of existing buildings over new build and in using new energy efficient systems and technologies.

Secondly, the sector is also at the forefront in driving forward new scientific advances and innovative ways that help mitigate and manage the pressures on the natural environment. It engages with a very broad range of resource-use issues, and there are likely to be increasing opportunities to derive income streams from the provision of land and water management, habitat creation and biodiversity support. These ideas were explored in the recent National Ecosystem Assessment and outlined in the Natural Environment white paper published by Defra.⁶

The third scenario is where the heritage sector can build on its creative industry links to assist in, for example, the design of low carbon products, or advertising that encourages and informs consumer demand for such products and services. Opportunities for the heritage sector will include green energy production and supply, providing advice on energy efficiency and assisting in the design and creation of low-carbon products and services.

³ House of Lords Science and technology Committee, 2012 *Science & Heritage – A follow up*

⁴ Rypkema, D. (1999) *Culture, Historic Preservation and Economic Development in the 21st Century*

⁵ Power, A. et al (2010) *Phoenix Cities: The fall and rise of great industrial cities*. The Policy Press: Bristol

⁶ Defra, 2011. *The Natural Choice: securing the value of nature Cm8082*

2 ADAPTING: HOW HERITAGE ORGANISATIONS CAN ADAPT TO BECOME MORE RESILIENT

Resilience implies not just surviving, but a level of adaptation with a focus on core purpose and future goals. To help understand this the research examined two questions:

[1] What are the characteristics of a resilient organisation?

[2] What are the barriers to resilience and how can they be overcome?

As part of this research BOP Consulting interviewed the leaders of organisations to identify the challenges they were facing and how they were adapting to deal with this. This involved both organisations with a specific heritage remit, and those whose involvement with heritage was more indirect. The organisations studied included those listed below (some are covered in more detail in the text:

Beamish Museum (North East) An open air museum in County Durham that teaches visitors about life in Georgian, Victorian and Edwardian times through re-enactment, education and events.

Drystone Craft International (North West) A family-run dry stone walling company that expanded its business beyond boundary walls into landscaping and engineering.

North West Film Archive (North West) Part of Manchester Metropolitan University, the Archive preserves documentary footage about life in the region. It is relocating to Manchester Central Library as a partner in Archives+.

Hodsock Priory (East Midlands) A listed historic house in Nottinghamshire that has been continuously occupied by the same family since the mid-18th century.

Birmingham Conservation Trust (West Midlands) A Building Preservation Trust that acts to protect Birmingham's architectural heritage and encourages people to better understand and enjoy the city's historic buildings.

Battersea Arts Centre

Example of

- Bringing in fresh perspectives
- Finding new sources of income

Scale

- Employees: 59 (FTE) and 12 (PT)
- Active volunteers: around 100
- Annual turnover: around £2.8m

Since 1980 Battersea Arts Centre (BAC) has delivered an acclaimed theatre programme from the large 19th-century building that formerly housed Battersea Town Hall.

In the past few years BAC has taken a unique approach to using the Hall's heritage. Previously BAC worked within traditional theatre spaces inserted into the building. This has given way to a new approach exploiting the possibilities of the building's historic features and 72 rooms, with the building becoming an important part of the audience experience.

During the recession, BAC has experienced a severe decrease in Trust and Foundation income. However the Trust considered that it was important for its support to ensure that the level of artistic ambition is maintained.

Another innovation is hosting Christmas parties. This is considered to have required good communication and coordination between the enterprise and artistic arms of BAC, to support efficient delivery. Restoration of the building has also supported income generation by making its rooms more attractive to hire.



A performance of The Red Shoes at the Battersea Arts Center in 2011. © James Allan

Apsley Paper Trail (East of England) A charitable trust based at a historic paper mill in Hemel Hempstead run by a small core of staff and volunteers. The site has a visitor centre and café and promotes the history of the paper making industry through exhibitions, tours and hands-on activities.

Colchester and Ipswich Museums (East of England) The merger of Colchester and Ipswich Councils museum services.

Luton Culture (East of England) An independent trust created from Luton Council's arts, museums and libraries services in 2008.

Battersea Arts Centre (London) A performing arts centre based at the old Battersea Town Hall. In addition to expanding its customer offer and community facilities, the company have devised a unique approach to adapting the Town Hall's imposing Victorian rooms for theatre and restoration.

London Metropolitan Archives (London) A consolidation of several London archives in a new state-of-the art centre in Clerkenwell.

Headley Forge (South East) A listed 18th-century forge in Surrey which has been refurbished to accommodate office space and a working blacksmith while still retaining its historic character.

Arnos Vale Cemetery Trust (South West) The Trust runs the community centre, café, shop and cemetery at Arnos Vale which, with the help of Bristol City Council and the HLF, has just undergone a major rescue and restoration.

Glasgow Buildings Preservation Trust (Scotland) A charitable trust established in 1982 to rescue, repair and rehabilitate historic buildings in Glasgow and the surrounding areas.

Woodland Trust (National) A charity with over 200,000 members, it owns over 1,200 woodlands across the UK. Its aim is to protect and restore ancient woodland, create new native woodland and inspire people to value woods and trees.

Hodsock Priory

Example of

- Bringing in fresh perspectives
- Finding new sources of income

Scale

- Employees: 25 (FT/PT/seasonal) + 20 extra for Snowdrops garden openings
- Volunteers: 600 Friends of Hodsock
- Annual turnover: £865,000

Hodsock Priory is a listed historic house in Nottinghamshire. It has been in the hands of the Buchanan family since the mid-18th century. The estate has long been run as a farm, but the costs of maintaining the house and gardens have weighed heavily on the family, and efforts have been made to diversify its income streams. When George Buchanan took over the running of Hodsock in 2006, he accelerated this.

George's first idea was to turn the Priory into a wedding venue. The wedding party has exclusive use of the house, and the staff pride themselves on their hospitality and levels of service for guests. An extension has been built to create a large room for wedding guests' use. As a result, the Priory averages 35-40 weddings a year, accounting for around 45% of the house's income, the same as farming.

In the last few years, Hodsock has developed an events programme and tries to hold at least one event per month throughout the year. The house is also developing other activities, such as hosting business meetings.

George is intending to introduce a formal board structure involving people from outside the family to bring in wider expertise. Maintaining such a property is an ongoing process, and he hopes that doing this will help secure the Priory's future.



A view across the lawn at the elevation of red-brick Hodsock Priory. © BOP Consulting

Beamish Museum

Example of

- New organisational structures
- Management and staff interventions
- Bringing in fresh perspectives
- Finding new sources of income

Scale

- Employees: 270 (FTE) (more than 300 during March-October)
- Volunteers: 350 – 400 (25,000 hrs of help a year); 2000 friends
- Annual turnover: £6.7m in 2011/12

Supported by a partnership of local authorities, Beamish Open Air Museum was opened in the 1970s and grew to be a major visitor attraction. By 2008, however, visitor numbers had declined, the site needed updating and local authority revenue funding was in decline. It was recognised that changes in how the museum was run were needed, while retaining its identity and character.

Beamish overhauled its operating model and reduced its dependency on public sector support by becoming fully independent. The museum transferred to charitable status with local authorities retaining control via committee – giving staff the freedom to fundraise, invest and generate surplus. A restructure accompanied the move to charitable status with a reduction in the number of management posts and an increase in flexible staff contracts to help extend seasonal opening.

Other innovations included new events programming, more community engagement, staff training, franchising and new ticketing models. Visitor numbers have since grown by 65%, achieving an operating surplus of £635,000 from a turnover of £7 million in 2011.



The Felling Pit disaster of 1812, commemorated at Beamish in May 2012.
© Beamish Museum

2.1 WHAT ARE THE CHARACTERISTICS OF A RESILIENT HERITAGE ORGANISATION?

The research found that the organisations studied had a number of characteristics which helped ensure their resilience.

Their focus on developing people

- They think about their relationship with volunteers and supporters
- They ensure internal communication
- They focus on recruiting the right people at board level

Their approach to their historic assets

- They make best use of their assets commercially
- They balance heritage conservation and public engagement

Their strategic outlook

- They plan ahead, continually adapting to smaller-scale changes while anticipating the future
- They are visible and connected
- They are pioneers

These are now discussed in more detail. They may not be applicable in all circumstances, but indicate the kinds of strategies that are being adopted to help make organisations more resilient.

Their focus on developing people

They think about their relationship with volunteers and supporters

The organisations studied had a thorough understanding of:

- Their volunteer and supporter base and what motivates and rewards them.
- How to use this knowledge to design opportunities tailored to each type of volunteer or supporter.
- The coordination, training and support needed to get the most out of volunteers, and to assist staff working with volunteers.

Apsley Paper Trail Trust

Example of

- Management and staff interventions
- Greater use of volunteers

Scale

- Employees: 3 (FTE) and 6 (PT)
- Volunteers: 64
- Turnover expected for 2012: £385,000

The Apsley Paper Trail Trust near Hemel Hempstead owns the former production base of Basildon Bond paper and nearby the oldest mechanised paper mill in the world, Frogmore Mill. The Basildon Bond site was partially developed to provide an income for the Trust through a pub and small business space, while Frogmore Mill was the focus for visitors and the continuation of paper production. After a sale of land fell through owing to the recession, the Trust was placed in a parlous financial state. All the staff were made redundant and the 'big' paper making machine was stopped.

A core staff decided to continue as volunteers and three redundant machine workers set up their own company to produce paper on the smaller machine at Frogmore. The Trust sought advice from a corporate recovery consultancy, which helped them develop an alternative plan to survive then thrive once their position improved. The firm also helped them make agreements with their creditors. The belief that they were doing something important motivated former staff and has helped them turn a corner as they try to secure the long-term viability of these two important sites. www.thepapertrail.org.uk



A volunteer in an apron shows a visitor how to press paper with a machine.
© BOP Consulting

They ensure internal communication

Some of the techniques used to support this were:

- Regular team meetings, briefings and future planning sessions.
- Matrix management – bringing together staff from different teams (plus volunteers) to collaborate on projects, thus breaking down silos and hierarchies and connecting skills from across the organisation.
- Performance indicators – sharing indicators with staff and supporters quickly, to gain their understanding and ownership of the organisation's performance; and to reward and share success.
- Focus on long-term vision – linking new initiatives back to the vision, particularly to get longstanding supporters on board with change.

They focus on recruiting the right people at board-level

- Most of the organisations surveyed used a structured recruitment approach to ensure they had strong boards. Board skills are regularly audited and people recruited to fill gaps. The most sought-after skills are financial acumen and legal and human resources expertise.

Their approach to their historic assets

They make best use of their assets commercially

All the leaders of the organisations examined were comfortable talking about commercial use of their assets. Tips and approaches included:

- Identifying the unique selling points that contrast your organisation with competitors.
- Aiming to attract diverse income streams to avoid dependence on any one source.
- Sharing services and ventures with partners where this makes for more efficient delivery.
- Assessing risks and seeking to minimise them by testing new products and services on a small scale before scaling up.

Birmingham Conservation Trust

Example of

- New sources of income
- New organisational structures

Scale

- Employees: 1 (plus one part-time temporary freelancer)
- Registered volunteers: 74 (12 are Trustees)
- Annual turnover 2011-12: £66,856

Birmingham Conservation Trust (BCT) is a building preservation trust responsible for restoring a number of properties over the last 30 years. One long-running project was the restoration of the 19th-century Grade II listed Newman Brothers Coffin Works, which retains its Victorian contents and equipment. The original proposal envisaged that the site would be a mix of museum, recreating the original factory; education and community space; and offices for rent. However this fell through when Advantage West Midlands (the local RDA) had to withdraw due to economic difficulties.

Following this, a new proposal involving refurbishing a 1960s office wing and using it for a mix of activities including education and office space was developed. The front of the building will be used as an events venue while the original back range will be converted into office space for rental to local businesses. BCT will move into the Works and run the venue.

The scheme represents a significant shift in emphasis for the project. Rather than including a conventional museum, the Coffin Works will be a place where unusual and experimental events can take place. The change will also allow greater educational and community engagement work, and there are plans to use the Works for hosting themed dinners, and film and media shoots.



Newman Brothers Coffin Fitting Works Birmingham, the BCT's current project. © BOP Consulting

They balance heritage conservation and public engagement

Resilient organisations strike a balance between maintaining heritage and engaging the public. A risk with heritage is that sometimes the challenges of the asset can lead to customer relations being overlooked, which can be detrimental to resilience. As one leader pointed out, 'we are here to make a heritage asset available to the public ... it's not about preserving something for its own sake'.

Their strategic vision

They plan ahead, continually adapting to smaller-scale changes while anticipating the future

All the leaders showed a strong understanding of how their organisation functions as a business, and how this relates to their overall vision. Their experiences also highlight the importance of:

- Horizon scanning for changes in the operating environment and new opportunities.
- Identifying new short-term opportunities (perhaps up to 12 months ahead) to sustain or develop the organisation – for example new funding, products or markets.
- Changing business plans in response to short-term opportunities – but avoiding projects that skew or change the organisation's fundamental aims.
- Learning when to say no, for example, turning down a grant if it is too big a commitment.
- Reviewing legal status and considering the merits of alternative models (e.g. trust status, shared services, trading arm, outsourcing).

For most of the case study organisations, the recession brought a series of smaller shocks that they were able to foresee or adapt to without major changes. Birmingham Conservation Trust and Apsley Paper Trail were exceptions to this: both saw large financial arrangements vital to their business plans fall through. However, both organisations were ultimately able to withstand these and continue without radically changing their business model. It may be a testament to heritage's power in engendering passion that gives these organisations the resilience to survive.

They are visible and connected

Resilient heritage organisations are networked beyond their immediate local area and the heritage sector (and consider recruiting from other sectors). Networks include:

- **Umbrella associations** such as The Heritage Alliance and Civic Voice. These provide advocacy, policy input and guidance on issues that affect the entire sector.
- **Trade associations** that bring equivalent organisations together to advocate common needs. Leaders need their own support network ('It's lonely at the top') and these groups provide opportunities to build deeper relationships between peers.
- **Regional and local networks** for voluntary sector organisations, social enterprises and the tourism industry
- **Boards** – sitting on others' Boards may be valuable, giving an opportunity to see how other organisations operate.

They are pioneers

Many organisation leaders spoke of the challenges of operating at the cutting edge of the sector. They recognise that their entrepreneurial activities challenge assumptions about what is considered usual practice. Examples of this are:

- Charging for online access to digital material
- Promoting a diverse range of non-heritage activities on a sensitive heritage site
- Replacing paid staff temporarily with a volunteer-run structure.

Several leaders felt they have missed out on grants because of funders' lack of understanding, or because they are being 'penalised' for their pragmatism and success. On the other hand, many believe that success generates success and it is vital to be seen to be maintaining ambition and momentum in the current climate.

Headley Forge, Surrey

Example of

- Bringing in fresh perspectives
- New sources of income

Scale

- N/A – part of larger property development company

Headley Forge is a 18th-century Grade II listed smithy in the village of Headley. It had remained in industrial use until 2009 when the last blacksmith moved out. The site was bought and refurbished in 2011 by local developer Paul Furr, who saw an opportunity to create unique business premises, converting the building to offices but retaining some light industrial use.

The refurbishment lasted seven months and involved two craftsmen experienced in working with listed buildings. Despite a number of minor structural changes to the building, the project ensured that its past life as a forge is still visible. For example, the old hearth is now the centrepiece of a modern glass conference table.

Paul Furr believes there were many benefits to the project – he now has experience in conservation, he has developed a good working relationship with the local authority, and the Forge project has been a showcase for his company's growing reputation. The local community is also very pleased the Forge has not been lost and that a blacksmith has been brought back to the premises.

The building has won an award from the Surrey Historic Buildings Trust, in part because it was an unconventional project that showed 'you can do conservation on a low budget'.



Headley Forge after conversion to offices. © Pete Mills, Mole Valley District Council



2.2 BARRIERS TO RESILIENCE AND HOW TO OVERCOME THEM

Some factors make resilience difficult for heritage organisations as they reduce capacity to respond quickly to major changes.

The research examined 'rigidities' which reduce the flexibility and speed of response to challenges. It identified two sources of rigidity, that related to resources and that related to routines. Opposite are some of the constraints and ways that they can be overcome.

Crowds of people visited the recently refurbished Robert Raikes's House in Gloucester for Heritage Open Days in 2011. Over the years, this 16th Century building has been a private house, a shop and now, a thriving pub.
© James Davies, English Heritage

Resource constraints

Organisations constrained from securing the financial or labour resources needed to develop innovative practices. Examples include:

- a lack of working capital to invest in experimentation and change
- a lack of suitably skilled labour
- external investors or funders putting restrictions or performance requirements on funding

How to overcome resource constraints

Sharing resources

- Merging services
- Sharing resources and space

Making greater use of volunteers

- Restructuring volunteering around executive teams
- Central support and regional structures for volunteers
- Increasing reliance on volunteers and building up a new volunteer base

New income sources

- Revising admissions, introducing events, on-site franchises, promotions and cross-marketing
- Growing events hire business
- Converting some space to offices for rent
- Commercial deals

Changing routines

All companies or organisations develop systems or processes which allow them to operate. Indeed, routines can be an important part in what makes an organisation successful, such as routines that ensure a consistent level of service for customers. Nevertheless, in times of change they can become a straitjacket leading to:

- senior management or board members without the skills to help an organisation deal with change
- staff unable to think in an entrepreneurial way
- organisational structures that are no longer 'fit for purpose'

How organisations can change routines

New organisational structures

- Leaving local authority ownership to become independent charities
- Establishing a new Trust
- Establishing a trading arm to handle catering and event hire operations

Management and staff interventions

- Introducing matrix management structures
- Creating central support for staff working with volunteers
- Recruiting boards with more varied skillsets

Fresh perspectives, outsourcing

- Appointing new directors
- Importing museum outreach practice
- Joining with other similar regional bodies

3 FURTHER EXAMPLES OF CHALLENGES AND RESILIENCE IN HERITAGE

Heritage Building work and the Recession

The economic climate of the past few years has seen a number of companies with specialist skills in historic buildings work being placed in administration. In February and March 2012, ConstructionSkills carried out 30 in-depth interviews with a broad spread of construction and professional services companies to better understand how heritage building work has been affected by the economic downturn.

Although very few respondents suggested that business conditions were good, those surveyed who work specifically in the heritage sector said that they felt this area of business was doing comparatively well. Reasons suggested for this included the atypical sources of funding (e.g. lottery grants) and the fact that many older buildings of architectural interest are owned outright by private owners, who are more likely to use their equity to fund repairs and maintenance.

Multiple respondents cited the lack of mortgage finance and bank lending, and the sudden reduction in public spending on infrastructure and maintenance as a major challenge to their business. It was considered that while prices paid for construction work have on the whole fallen, the cost of materials and ancillary things (for example the price of fuel) has risen making margins tighter.

St John's, Fernham, Oxfordshire

An example of resilient adaption in churches

The Grade II listed 1861 gothic revival chapel of St John the Evangelist in the village of Fernham was, by 2002, cold, damp (the roof had a £200,000 repair bill) and the congregation had fallen to half a dozen people. The village had recently lost its village hall so there was a demand for a new community space.

In November 2004, Neil Sutherland, Treasurer of St John's and a civil engineer, brought together a group of people with skills including finance, fundraising and events and founded a charitable trust called Project Inspire to transform the church into a warm, flexible event space. Funds and advice were obtained from nearly two dozen organisations, including the local council, the Big Lottery Fund and many other charitable organisations.

The building reopened in May 2010. The biggest challenges for the project team were obtaining a faculty from Oxford Diocese and reaching a workable agreement on the re-ordering of the building with stakeholders who were initially opposed to the conversion. While still very much a place of worship, the church is also now the focus of community life, being used for classes, celebrations and other community activities.

After careful negotiations with the Diocese, some significant changes have been introduced to manage the building post-conversion including a 30 year repairing lease and a provision for a 60:40 split with the Diocese for any major works required.



Recently refurbished church of St. John's Fernam decked out for a 'Last Night of the Proms' party. © Neil Sutherland

HOW BUILDING PRESERVATION TRUSTS (BPTs) CONTRIBUTE TO THE RESILIENCE OF THE HISTORIC ENVIRONMENT

BPTs are trusts with the specific objective of the preservation and regeneration of historic buildings. They contribute to the resilience of the historic environment by often taking on buildings that are challenging for private developers to tackle and might otherwise be lost. As part of this year's *Heritage Counts* research was undertaken by the Architectural Heritage Fund (AHF) into the number of BPTs and the factors which contribute to their successful operations.

The AHF's work indicates there were 155 BPTs in England in 2012 (as defined by membership of the Association of Building Preservation Trusts (APT). These were actively involved with 102 projects to save historic buildings. Some of these employ paid staff, but the majority depend on a number of highly committed volunteers.

The work identified two 'types' of BPT. There are 'single-project' BPTs, whose foundation often stems from local communities and whose purpose is linked to protecting a specific site. These Trusts often retain ownership of the restored building and manage it as a visitor attraction or community facility.

The second type of BPTs identified are the 'multi-project' BPTs, which acquire a site, restore it, and move on to the next site. These trusts account for a large proportion of work undertaken by BPTs. They are typically focused on a particular geographic area – such as a local authority – and in most cases have developed or are exploring alternative income streams in addition, or sometimes as an alternative, to rescuing a building.

An increasing number of BPTs have evolved from actively rescuing buildings to becoming organisations which manage and maintain a portfolio of sites. They may have chosen to do this or due to uncontrollable circumstances have had to retain ownership of completed projects and so are less able to take on new ones.

The table shows the regional numbers of BPTs and their live projects. The South West and North West account for more than half of all current live projects. The South West has a relatively large number of mostly 'single project' BPTs, while 20 of the North West's live projects North West are being delivered by one regional BPT and its 3 subsidiaries.

For a BPT to acquire a site, it must secure funds to purchase, cover the conservation deficit and have a financial plan for the property on completion. This

Region	BPTs*	Live projects
South West	35	31
East of England	24	8
West Midlands	19	5
North West	18	23
East Midlands	12	12
London	12	7
Yorkshire & the Humber	12	5
South East	11	6
North East	5	0
N/A National	7	
Total	155	97

*Members of the UK Association of Preservation Trusts as at 31st March 2012. Note: The live project figures excludes 5 projects that were completed in 2011/12

enables multi-project BPTs to invest surpluses in the next project/phase. In areas where property markets are more buoyant, often it is only the most difficult properties – those rejected by commercial developers – that are left for BPTs. This is a reason why some BPTs (and indeed their prospective funders or supporters) may appear risk-averse or unwilling to acquire buildings posing such a liability.

BPTs often rely on local authority support through repairs notices, compulsory purchase proceedings and back-to-back agreements. For example, over two-thirds of BPTs in the APT's study, *A Strategy for Stimulating Building Preservation Trust Activity in the South West of England* reported receiving support and encouragement from their local authority.

Many organisations (local authorities included) seek the highest possible returns when selling assets and may be reluctant to transfer them to BPTs at below market rates – even sites with significant conservation deficits. The new Localism Act's Community Right to Bid may make it easier for BPTs to acquire sites.

The research found grant-giving bodies played a crucial role in providing BPTs with resources to rescue buildings. This has meant a significant proportion of BPT projects have, as a condition of their funding, been shaped by funding bodies' priorities. For example, The Heritage Lottery Fund's (HLF's) criteria require projects to provide public benefits such as access or learning opportunities. This approach is well suited for buildings whose end-use is as community centres or visitor attractions. It has been more challenging to attract grants to repair and convert buildings for residential/commercial use, even where this is considered the most viable use to ensure survival. Some organisations, such as the Landmark Trust, have successfully obtained HLF grants for projects involving the repair and adaptation of historic buildings where public access will be limited in the future, having met HLF's requirements by providing opportunities to engage the public in the project delivery phase. The new Heritage Enterprise grants announced in HLF's strategic framework are expected to provide more funding opportunities to repair and convert buildings for commercial use.

02

THE HISTORIC ENVIRONMENT IN 2012: AN OVERVIEW

Introduction

This has been a high-profile year for heritage. Policy changes in planning and taxation affecting the historic environment were debated nationally, and a record proportion of the population visited historic places. This has been in the context of a continuing difficult economic climate, and the spotlight on the UK during the Jubilee celebrations and the Olympics.



Aerial photo of Stonehenge used for the 2012 'Britain is GREAT' Campaign. © VisitBritain

The scope for communities to become involved in managing their local heritage has widened in the past year. The Localism Act introduced neighbourhood planning and community rights to own and manage heritage.

Meanwhile, however, the number of front line staff employed by local authorities protecting the historic environment continues to fall, with implications for the availability of expert advice to inform decisions that affect heritage.

The National Planning Policy Framework (NPPF) gained widespread media coverage as a broad coalition of organisations sought changes to the policy, to ensure the protection of the historic and natural environment. As part of this, the National Trust mobilised its supporters in a high-profile campaign on the proposed changes. The debates on the NPPF included the first widespread use by heritage organisations of social media as a tool to raise awareness and lobby decision makers. The subsequent campaign on the proposed imposition of VAT on listed buildings alterations also made extensive use of social media, and, although the policy was not overturned, obtained concessions to mitigate some of the policy's effects.

In the current economic circumstances ensuring that heritage's contribution to the economy is recognised, and that it is seen to facilitate, and not hinder, growth is an increasingly important part of policy discussions. Under the auspices of the Penfold Review, the Government is actively examining ways to streamline the planning system for designated assets.

While these are challenging times, the past financial year has also seen a welcome increase in participation. Visitor numbers are up, and people's involvement in heritage has never been higher - almost three quarters of adults visited a heritage site in the past year. These increases in national participation have also been reflected regionally and across a wide range of socio-economic groups.

PLANNING SYSTEM CHANGES

Localism Act

The historic environment sector worked very hard to ensure that the final wording of the Localism Act would deliver benefits to local heritage protection. A number of changes were achieved, and some unintentional negative implications in specific clauses were addressed.

The implementation of the Act brings new powers for communities to shape their localities. These will allow:

- communities to prepare neighbourhood plans that will form part of the statutory development plan;
- communities to establish neighbourhood development orders, that will grant permission for a development or type of development in a specified area;
- a community right to build which allows community organisations to bring forward development proposals meeting certain criteria and with clear local support without the need for planning permission;
- a community right to challenge and express an interest in running a public service;
- a community right to bid for assets of community value.

A number of organisations including Civic Voice, the Heritage Alliance and English Heritage are helping communities to use these new powers in ways that protect and enhance heritage.

The Act also saw changes to the Community Infrastructure Levy, reform of the local plans process and changes to the handling of nationally significant infrastructure projects.

National Planning Policy Framework

The National Planning Policy Framework (NPPF), published on 27th March 2012, replaced all previous Planning Policy Statements – including Planning Policy Statement 5: Planning for the Historic Environment (PPS5) and some other pieces of planning guidance. Taking the “presumption in favour of sustainable development” as its central theme, the NPPF sets out 12 core land-use planning principles which underpin both plan-making and decision-taking.

While matters relevant to the historic environment occur throughout these principles – particularly design, urban and countryside policies – it is the section on

‘Conserving and Enhancing the Historic Environment’ which supersedes PPS5. Although considerably shorter than PPS5, the historic environment chapter follows its predecessor's significance-led approach to decision-taking closely. Early indications from Planning Inspectorate appeal decisions suggest the NPPF has been implemented without a noticeable loss of protection for the historic environment.

One of the very welcome changes was the unambiguous integration of historic environment considerations into the definition of sustainable development. It is also made clear that historic environment considerations can override identified planning needs – such as new housing – where the adverse impacts significantly and demonstrably outweigh the benefits.

It remains to be seen, however, how the NPPF will be interpreted in practice and there are a number of other Government proposals, such as changes to permitted development limits, that will need careful scrutiny to ensure levels of protection for heritage are not reduced.

Guidance for the historic environment section of the NPPF

It is widely considered in the historic environment sector that the now very succinct Government heritage policy needs some clarification to minimise grounds for misinterpretation. At the time of writing, the Government is considering how to clarify the NPPF guidance as a whole, but has stated it should be cut to an absolute minimum. While Government develops a strategy for producing or endorsing guidance, the PPS5 Historic Environment Practice Guide remains valid.

The Historic Environment Forum has been working on more succinct guidance, which is being discussed with Government. This is likely to link to more detailed guidance on technical issues where streamlined approaches and procedures are in the interests of applicant and decision-makers, for example, on the concept of ‘enabling development’.

Setting guidance

The NPPF confirms that proposals which preserve elements of an asset's setting, and make a positive contribution to the overall significance of the asset, should be treated favourably. Carefully weighing the impacts of proposals affecting setting or significance will therefore be a fundamental part of the planning process.

English Heritage published new guidance on The Setting of Heritage Assets providing advice on managing changes within the settings of archaeological sites and historic buildings, areas and landscapes. It is intended to assist implementation of the NPPF, and provide a sound basis for English Heritage when responding to consultations. It will help individuals and organisations involved with managing development in the setting of heritage assets.

The Penfold Review of Non-Planning Consents

In November 2011 the Department for Business, Innovation and Skills (BIS), published its plans for the implementation of the 2010 Penfold Review. This indicated eight areas of action, four of which had already appeared in the draft Heritage Protection Bill in 2008, and form part of the Enterprise and Regulatory Reform Bill due to pass into law in April 2013. These proposed powers are:

- to enable the extent of a listed building's special interest to be legally defined;
- to enable developers to seek a Certificate of Immunity from Designation or Listing at any time;
- to allow owners of listed buildings and local authorities to enter into Statutory Management Agreements; and
- to remove the requirement for Conservation Area Consent when demolishing unlisted buildings.

All these changes are sensible proposals, which should improve certainty in the system for owners without reducing protection.

The Review includes a commitment for English Heritage and the Department for Culture, Media and Sport (DCMS) to undertake a prioritisation programme – to update the list entries of listed buildings – which is already underway.

A final four heritage-related proposals were put out to consultation in the summer of 2012. The nature of the proposals raised considerable interest among heritage sector organisations and those with an interest in the historic environment. In October 2012 the Government published its response to the consultation. This stated that a proposed system of deemed consent would not be taken forward, but that the following would be introduced:

[1] a system of local and national class consents;

[2] a Certificate of Lawful Works in relation to proposed works;

[3] a system of accredited agents who could make recommendations to local planning authorities but via a non-statutory route, working with industry to realise the most appropriate way to introduce a light-touch system.

The Government would also consider, in relation to buildings at risk, what further measures are appropriate to deal with the reform of enforcement powers.

Where possible the Government will seek to introduce the legislative changes required in the Enterprise and Regulatory Reform Bill currently being considered by Parliament.

The National Heritage Protection Plan (NHPP)

The NHPP was launched in May 2011 by John Penrose, the then Minister for Tourism and Heritage, as the 'business plan for the historic environment'. It aims to improve the heritage sector's ability to protect England's historic environment. Devised in consultation with numerous bodies, the NHPP will develop concrete and coherent action plans across the sector, thus identifying gaps in coverage, reducing duplication of work, and building collaboration. The NHPP is divided into eight Measures which help to integrate research and practical management and conservation. These Measures encompass a number of prioritised Activities derived from the NHPP consultation. A full list of the Activities can be seen on the English Heritage's NHPP website pages (www.english-heritage.org.uk/NHPP). The Activities set out priorities for heritage protection, which Action Plans (targeted programmes of work) are then created to deliver. In developing their Action Plans different organisations, communities and individuals are able to focus on their own strengths and objectives and to contribute to these shared aims.

English Heritage has its own NHPP Action Plan. This, along with two 6-monthly reports on progress can be found online (www.english-heritage.org.uk/professional/protection/national-heritage-protection-plan/consultation/). Work this year has focused on widening the audience for the NHPP and encouraging NHPP partners to think about their own Action Plans, and developing a clearer online presence for the NHPP. The NHPP is dynamic, and consultations will be held each year (in December and January). However English Heritage encourages constructive views and comments at any time through the email address NHPP@english-heritage.org.uk.

CHANGES TO THE FUNDING AND RESOURCES LANDSCAPE

VAT

The charging of VAT on repairs and maintenance, but not on new-build construction work, has long been considered a disincentive to invest in maintaining historic buildings. Approved alterations to listed buildings were, however, historically eligible for zero rating.

In his March 2012 Budget the Chancellor announced his intention to impose VAT on alterations to listed buildings, thereby raising concerns that alterations which help adapt historic buildings to modern use would be discouraged; that a significant number of projects already underway, or about to commence, would become financially unviable and cease; and that a likely increase in black-market alterations work might damage historic buildings.

Organisations from across the heritage sector campaigned against the proposals, including The Heritage Alliance, the Historic Houses Association (HHA), the Church of England, the Historic Towns Forum (HTF), the Country Land & Business Association (CLA), the Listed Property Owners Club (LPOC), and affected owners and individuals. Information was disseminated using conventional and social media outlets.

This issue attracted 818 out of the total 1,493 consultation responses on VAT consultation topics. While the decision to apply VAT to alterations was not reversed, concessions that reduced the impact on existing projects and places of worship were made.

The criterion for projects being eligible for zero rating, during the transition period, was changed to having applied for listed building consent at the time of the Budget. The original proposal was the more restrictive requirement that projects had to have a contract in place at the time of the Budget.

The transition period in which eligible alterations would remain zero rated was extended by an extra 2½ years to 30th September 2015. This means that a project which had applied for listed building consent before 21st March 2012 will continue to be able to obtain zero rating until September 2015.

The Listed Places of Worship Grant scheme was increased by £30 million to take account of the increase in costs of alterations to listed places of worship incurred due to the policy.

Other Budget measures affecting historic houses

Two Budget measures are considered to have the potential, unless modified, to adversely affect historic houses, albeit it is thought that these are not the intended target. Historic houses owned by companies – will be affected by the proposed annual charge on residential properties valued at over £2 million owned by certain 'non-natural' persons (broadly companies, partnerships including companies and collective investment schemes). Conversely, historic houses open to the public which are not owned by companies may be affected by the capping of Sideways Loss Relief. This relief enables owners to use income received from outside the house-opening business to support the business in meeting the exceptional costs of major repairs or particularly poor trading conditions.

The Budget announced the Government's intention to legislate to remove an anomaly that deters owners of heritage property with a Heritage Maintenance Fund (HMF) from transferring ownership to the next generation. This was welcomed as a response to requests for action from the heritage sector.

The Green Deal

The Green Deal is the Government's flagship energy efficiency initiative. It is a financing mechanism for domestic and non-domestic buildings that allows the costs of energy efficiency improvements to be funded from savings on energy bills. Elements of the Green Deal have been criticised by a number of organisations including the Institute of Historic Building Conservation (IHBC), Society for the Protection of Ancient Buildings (SPAB),

Historic Houses Association (HHA) and the Conference on Training in Architectural Conservation (COTAC) who believe a 'one size fits all' approach has the potential to lead to the inappropriate application of certain modern energy-efficient technologies to historic properties.



A National Trust Warden chops wood for the Biomass boiler at Hardcastle Craggs in West Yorkshire. © National Trust

Organisations including English Heritage, Historic Scotland, Cadw, National Trust and SPAB are collaborating with the Sustainable Traditional Buildings Alliance (STBA) to promote better understanding of the performance of traditionally constructed (pre-1919) buildings. STBA was commissioned by the Department of Energy and Climate Change (DECC) to examine gaps in research and guidance on the retrofit of older properties and propose ways to address them. Its report 'Responsible Retrofit for Traditional Buildings' considers that a new approach to the retrofit of traditional buildings is necessary for the Green Deal's success. One of the report's key findings is that traditional homes often perform better in heat loss than stated in standard assessments. The report highlights a shortage of research for areas including existing traditional building energy performance, indoor air quality and ventilation rates. The consequence of this is that existing predictions could be highly inaccurate. It also means that retrofit programmes may be missing good opportunities for more effective measures.

DECC has responded positively to the report's concerns and has committed additional funding for research into some of the associated technical issues to help reduce the risks to vulnerable traditional buildings. The work and dialogue will be ongoing as the Green Deal develops to ensure the best possible outcome for historic and traditional buildings. The full-scale Green Deal programme is currently anticipated to launch in the New Year.

Philanthropy

In December 2010 Jeremy Hunt, then Secretary of State for Culture, announced the government's '10-point plan' for cultural philanthropy and the Giving Green Paper was opened for consultation (published in May 2011 as the Giving White Paper) which outlines the government's priorities for supporting cultural philanthropy.

In parallel the DCMS, the Arts Council England and the Heritage Lottery Fund pulled together £100 million to be distributed over the next five years to support philanthropic activities (the Catalyst Fund).

From 2011 new measures were introduced into the tax system, designed to benefit and reward those who give to charity. Additionally Gift Aid was simplified and charities were given the ability to 'thank' donors more generously (with an increased upper limit on how a donor may benefit from their donation). The annual budget for the Acceptance in Lieu and Cultural Gifts Scheme was increased to £30 million (from £20 million).

With the encouragement of DCMS, English Heritage and the Heritage Lottery Fund, The Heritage Alliance is taking forward a philanthropy programme for the heritage sector. During 2012 it contributed to fora and consultations as well as developed practical online resources around fundraising, particularly on attracting legacies. It ran a brainstorming session in partnership with the Institute of Fundraising to gain a better understanding of the sector's need for fundraising support. This was complemented by a more detailed training needs analysis with Heritage Alliance members.

Having identified the need for further support in fundraising skills within the independent heritage sector, The Heritage Alliance in partnership with the Institute of Fundraising has been developing a capacity building programme, which is hoped to launch in 2013. The target audience for the programme will be the wider heritage sector across the UK as well as other groups using heritage assets to deliver their objectives.

Local authority funding and capacity

English Heritage, the Institute of Historic Building Conservation (IHBC), and the Association of Local Government Archaeological Officers (ALGAO) have again undertaken a survey of historic environment staff employed by local authorities.

Since 2006 there has been a continuous decline in the number of historic environment staff employed by local authorities. By 2012 employment had fallen by over 300 full-time equivalent (FTE) members of staff – a reduction of more than 25%.

At the beginning of 2012 there were 909 FTE historic environment specialists providing advice to local authorities¹. This comprises 568 FTEs working on building and area conservation and 342 FTEs providing archaeological advice. This represents a drop of 16% in archaeological staff numbers, and of 30% in conservation staff numbers since 2006. In the past 12 months the number of archaeological specialists has fallen by 3% and the number of conservation specialists has fallen by 6%. However, ALGAO indicates that the amount of casework is not reducing.

The historic environment sector continues to argue for the retention of these important services which, once lost, will be hard to replace, at both a national and local level. The sector is looking to develop a greater store of evidence on the different models of service local authorities are seeking to employ. This partly builds on the case studies developed by the Historic Environment: Local Authority Capacity (HELAC) project, undertaken in partnership with ALGAO, IHBC, the Local Government Association and the Planning Officers Society. While these activities do not represent a solution to these cuts, they may provide helpful insights as other authorities look at remodelling their own services.

Heritage Lottery Fund Strategic Framework 2013-2018

In July the Heritage Lottery Fund (HLF) launched its new strategic framework for 2013-2018, A Lasting Difference for Heritage and People. This is a flexible framework rather than a plan, setting the direction for HLF's investment over the next five years, while ensuring the Fund can respond to newly emerging needs.

There is a high degree of continuity with the previous strategy: a response to HLF's strategic consultation in 2012, which endorsed many aspects of the Fund's existing direction. HLF will continue to support the full breadth of heritage across the UK, with a majority of its funding available on an open basis and a continued commitment to making the funding process accessible and proportionate. Targeted programmes for parks, landscapes, townscapes, places of worship and young people will be maintained with improvements and simplifications. HLF will continue its progressive agenda, focusing on long-term investments with a stronger emphasis on the outcomes funding can deliver.

As the sector faces economic challenges and uncertainty, there are new measures to help it achieve greater resilience and contribute to growth. A new Heritage Enterprise programme will encourage creation of sustainable end-uses for historic buildings and sites. Start-up grants of £3,000-£10,000 will be available to support changes in stewardship of heritage, and transition funding of £10,000-£100,000 will help organisations previously funded by HLF to develop plans for greater financial sustainability. Catalyst capacity building programmes will open in 2012-13 to build skills and capacity to increase private giving to heritage. In addition a further round of the Skills for the Future programme will build on the success of the first scheme, offering work-based training opportunities across the sector.

Other new directions include: the changes to digital policy and increased focus on achieving greener projects introduced in July this year; support for heritage in private ownership with grants up to £100,000 from 2013 for physical works to heritage which achieve a step-change in terms of public access and engagement; and a renewed commitment to strategic collecting for museums and archives, with a further round of the Collecting Cultures programme.

Heritage Crime

Heritage crime – such as theft from historic sites or criminal damage to buildings and monuments – is of increasing concern.

In 2012 a comprehensive survey of the impact of crime and anti-social behaviour on England's historic buildings and sites was commissioned to address limitations in existing knowledge. This was undertaken by Newcastle and Loughborough Universities and the Council for British Archaeology. The study estimates that:

- 70,000 – 19% of the entire stock of listed buildings in England – were physically harmed by crime in the past year. For some 30,000 listed buildings (8% of the entire stock) the damage was substantial;
- Metal theft is the biggest single type of heritage crime. Around 5% of listed buildings were affected by it; this figure trebles when it comes to churches, with 14% affected;
- Faith buildings face the greatest threat with 38% (more than a third) damaged by crime.



Metal theft is the single biggest type of heritage crime. © Ecclesiastical insurance

The seriousness of heritage crime is reflected in its status as a priority in the NHPP, and the formation of the Alliance to Reduce Crime against Heritage (ARCH). ARCH was developed by English Heritage, the Association of Chief Police Officers, the Crown Prosecution Service (CPS) and participating local authorities and community safety partnerships. It now has over 150 members including enforcement agencies, voluntary sector and community groups.

In addition, English Heritage now has a full-time National Policing and Crime Adviser and the CPS has appointed 14 Heritage Crime Coordinators to assist in the prosecution of the most serious offences.

World Heritage Sites

In 2012, a total of 26 sites from around the world were added to the World Heritage List (Chad, the Congo, Palestine and Palau having sites inscribed for the first time). At the same time, five sites were added to the World Heritage in Danger List. This included Maritime Liverpool, on the basis of the threat to its Outstanding Universal Value posed by the proposed Liverpool Waters development.

Periodic reporting for World Heritage sites in Europe and North America has now commenced, with all UK sites needing to report by 31st July 2013. To support World Heritage site coordinators in this process, English Heritage held training workshops in January and October 2012.

PARTICIPATION AND TOURISM

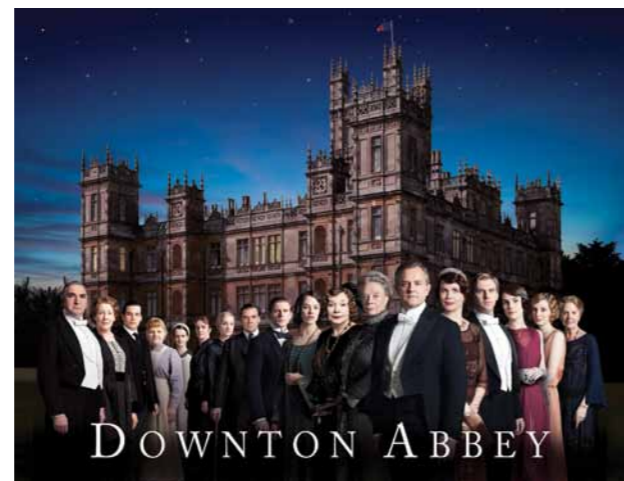
Visiting heritage sites

Almost three out of four adults (74%) visited the historic environment in 2011/12 – the highest level of public participation in heritage since official figures began in 2005/06 (when 70% of the adult population participated). This increase is found across England.

Since 2005/06, there has also been a notable increase in the proportion of people from a range of socio-economic groups visiting the historic environment. For example, black and ethnic minority participation has increased by 11 percentage points over the six years, and participation by lower socio-economic groups has increased by 6 percentage points.

Factors considered likely to be contributing to this growth in participation include:

- word of mouth and repeat visits from the increased numbers of people visiting historic sites in recent years;
- the continuing subdued state of the economy, which has reduced the number of people going abroad on holiday;
- the continuing popularity of historical themed television. The success of the series *Downton Abbey*, with more than nine million viewers, has boosted visitor numbers to Highclere Castle in Hampshire where the series is shot;
- investments made in a number of historic sites that have increased their attractiveness as destinations, such as, for example, the reopening of Tyntesfield in Somerset by the National Trust, the investments in the house and gardens at Muncaster Castle in Cumbria, and the Kenilworth Castle Garden Project in Warwickshire.



Successful ITV Period Drama *Downton Abbey* is responsible for an increase in visitor numbers at Highclere Castle, where it is filmed. © Carnival Film & Television

Stonehenge

Work has begun to return Stonehenge to a more tranquil setting and provide greatly improved visitor facilities thanks to a £27 million project financed by the Heritage Lottery Fund, commercial income and philanthropic donations including significant gifts from the Garfield Weston Foundation, the Linbury Trust and the Wolfson Foundation.

The project, developed in partnership with the National Trust, Wiltshire Council, the Highways Agency, and Natural England, will see the section of the A344 currently running past the monument closed and grassed over, reuniting the stone circle with its ancient processional way and the surrounding landscape. The remaining part of the A344 will be closed to public vehicles and become the route of a new visitor shuttle service to the stones. Visitors will be welcomed at new facilities located at Airman's Corner and approach the stones over chalk downland from the west.

A new exhibition, telling the story of this complex site and its relationship with the wider landscape, will feature important objects excavated near Stonehenge, on loan from the Salisbury & South Wiltshire Museum and Wiltshire Heritage Museum. The project is due to be finished by summer 2014.



Denton Corker Marshall's design for the Stonehenge Visitor Centre, located 1.5 miles west of Stonehenge, due to be completed in Autumn 2013. © English Heritage

Heritage Open Days visits

In 2011 Heritage Open Days (HODs) maintained its position as England's most popular volunteer-run event. Some 1.7 million visitors participated over the event's four days at 4,421 registered sites and events run by volunteers. In 2011, the central services for HODs were passed to Civic Voice, The Heritage Alliance and the National Trust.



HODs allows people see behind the scenes at the Tyne Theatre and Opera House in Newcastle upon Tyne. © Andrew Heptinstall

Government Tourism Policy

The Government's Tourism Policy, published in March 2011, recognised the importance of heritage tourism for economic growth while looking at ways of reducing regulations and helping to market Britain abroad.

In September 2011 the Prime Minister announced the GREAT campaign, the first cross-departmental campaign to market the UK overseas, bringing together the Foreign Office, the British Council, UK Trade & Investment (UKTI) and Visit Britain. GREAT aims to attract 4.6 million visitors to the UK over four years, generating tourist spending of £2.3 billion and creating up to 60,000 jobs.

Most recently, in August 2012 the then Culture Secretary Jeremy Hunt pledged to invest £8 million to expand GREAT from 2013. This will entail a strong focus on China, aiming to triple the number of Chinese visitors. A further £2 million in domestic tourism marketing, to be matched by funding from the industry, will build on the success of VisitEngland's 'Holiday at Home' campaign.

The Tourism Regulation Taskforce published its report in January. The Historic Houses Association represented heritage tourism businesses and successfully argued for historic character, culture and sustainability to be considered as a key criterion when evaluating proposals for regulatory change.

The Taskforce found that many of the 21,000 statutory rules and regulations identified by the Government through its Red Tape Challenge affect hospitality and tourism. Moreover with 80% of businesses in this sector being micro or small and medium enterprises (SMEs) – the difficulties and costs of complying with regulations were considered to be barriers to growth.

Over 50 recommendations were made for regulations to be abolished, consolidated, or amended, and a Cabinet Office tourism committee will focus on measures to address visas, alcohol licensing regulation and fire safety.



A traditional New Zealand Maori Powhiri (welcome) at the Hinemihi Marae (meeting house) in the grounds of Clandon Park in Surrey. © The Heritage Alliance

Cultural Olympiad

The Cultural Olympiad has seen thousands of events held up and down the country, providing a cultural celebration of the Olympic movement.

As a significant example of Cultural Olympiad events involving heritage, the Heritage Alliance's programme, Discovering Places, responded to the opportunity presented by the Olympics to inspire new audiences. It has directly engaged thousands of people with their local built, historic, and natural environments, and reached an audience of millions across the UK and internationally via social and conventional media. Projects held as part of Discovering Places included:

- The Royal Geographical Society's 'Walk the World' project. This used people's enthusiasm for the Games to inspire them to find links between their local environment and all 206 competing nations. An example of the project's activities was the Maori Meeting House, at the National Trust's Clandon Park property. Discovering Places worked with the Trust and Ngati Ranana London Maori Club to host members of the New Zealand Olympic team and people from the local community.
- The 'Discover Explore' project targets family groups with a specific focus on 5 to 11-year-olds with the objective of re-engaging local communities with their heritage. The Discovering Places website www.discoveringplaces.co.uk will carry all the project reports for legacy.



Investment at Tynesfield (including converting the Model Farm buildings into a year-round visitor centre) has led to dramatic increases in visitor numbers for the National Trust. © National Trust

Under-Represented Heritages

English Heritage has, through the National Heritage Protection Plan, actively canvassed the views of expert researchers on the history of groups which have been under-represented in assessing the significance of the historic environment. This will allow English Heritage to focus on the areas and types of heritage that should be better understood and protected, and are most valued by a broad and diverse public.

This involved consulting with academic and independent researchers specialising in: minority faiths in England; lesbian, gay, bisexual and transgender people's history; women's history; Asian, African and Caribbean heritages in England; and disability history. A series of workshops around the country, led by experts and involving community representatives, have examined what they feel is significant within the historic environment. The results of this exercise will feed into the 2013 NHPP review. The findings will also be shared with the wider heritage sector so that issues can be picked up more widely.

VOLUNTEERING AND SKILLS

Around 470,000 people volunteer in the historic environment, in a variety of roles. This includes taking on heritage buildings, stewarding at heritage sites, and commenting on local development plans or planning applications, as well as acting as trustees for the thousands of heritage and amenity societies across the country.

Two of the largest volunteering opportunities in the historic environment are Heritage Open Days (HODs) and the Festival of Archaeology. In 2011, HODs involved an estimated 39,000 volunteers. The Festival of Archaeology similarly had hundreds of volunteer groups putting on a range of events and activities across the country.

The role of volunteers and the value they bring to our sector has been recognised in two new awards schemes. The Heritage Alliance Heroes Awards and the English Heritage Angel Awards highlight and celebrate the successes of these volunteers. Also, this year, the IHBC Yearbook features the ways volunteers and professionals work together, and encourages innovative thinking on best practice.



Retired fisherman Nick Barrow in Hastings is one of thousands of volunteers whose knowledge and enthusiasm brings local heritage alive, contributing to the unique Heritage Open Days. © John Cheves, Creative Landscapes

Skills

The Heritage Lottery Fund's £17 million Skills for the Future scheme is supporting a number of organisations in providing training opportunities throughout the country. For example, the National Heritage Training Group is working across the nine English regions to provide training in heritage skills – including brickwork, carpentry, joinery, dry stone walling, earth walling, ironwork, thatching and roofing – for up to 120 trainees. At the same time, the National Trust will support up to 82 trainees in three key technical skills areas – house and collections management,

management of heritage visitor experience, and heritage horticulture and countryside management. These will take the form of structured, hands-on training placements at National Trust properties.

The Construction Industry Council has revised the National Occupational Standards (NOS) for Town Planning, Conservation and Building Control. These standards have been developed by industry practitioners and are supported by the relevant professional institutions and employer bodies, and are relevant for UK practitioners in the public and private sectors.

English Heritage has also revised the *Practical Building Conservation* series (first published in 1988). The ten new volumes provide practical reference for professionals engaged in the repair of historic buildings, and have been very well received.

The Protect our Place project

Civic Voice is running the 'Protect our Place' project. This is a wide-ranging survey of current community action. The project aims to provide a foundation for understanding the range of community action underway to protect local places and how this can be supported and strengthened. The project is being funded by English Heritage as part of the NHPP.

EDUCATION AND THE HISTORIC ENVIRONMENT

Heritage Schools

In February 2012 the Secretary of State for Education announced the awarding of £2.7 million to English Heritage to run a programme, Heritage Schools, which aims to make children proud of where they live, ensuring they understand more about their local heritage and its significance.

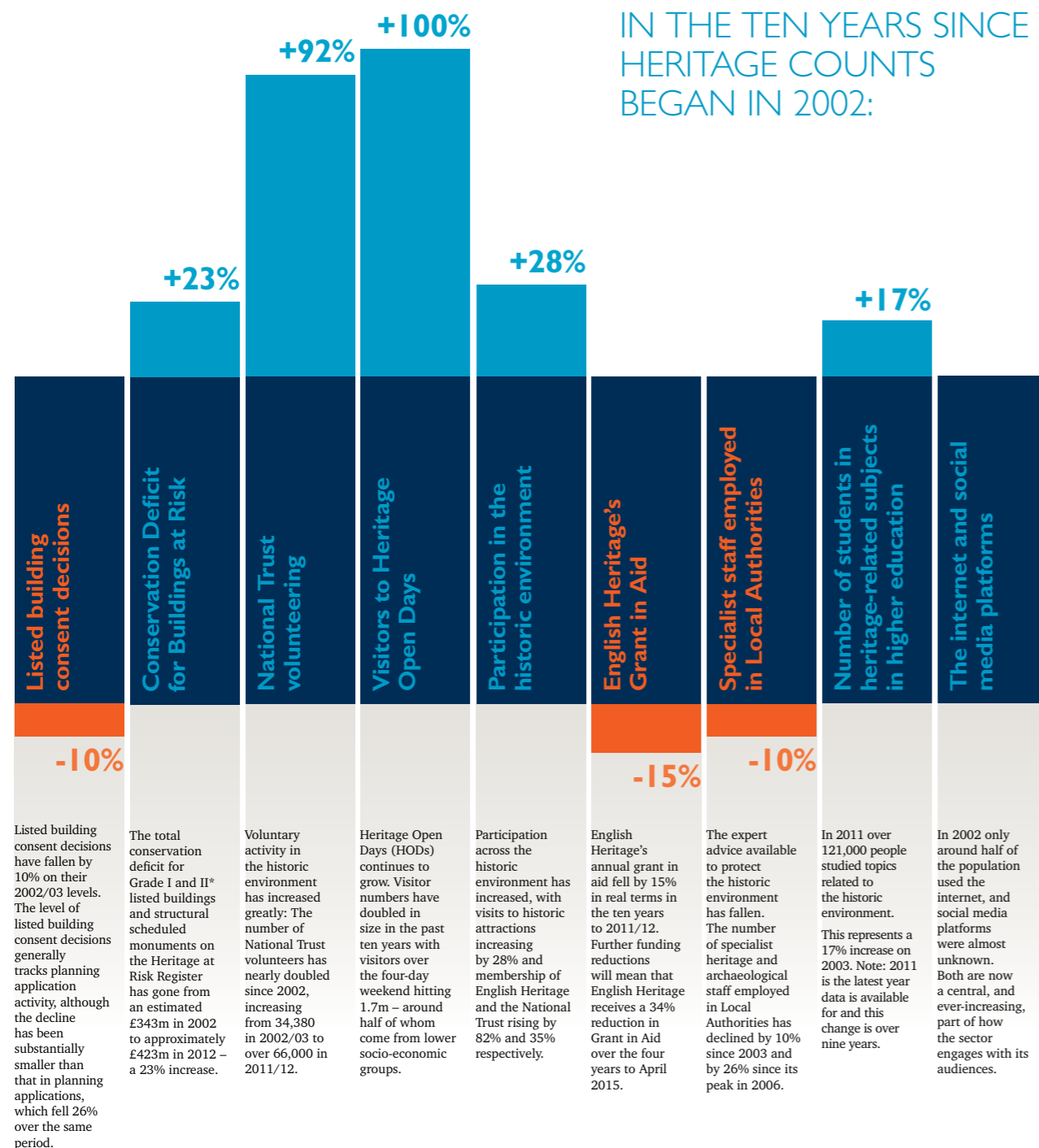
The project aims to deliver the curriculum in a way that connects it to a school's local area. To achieve this English Heritage is recruiting Local Heritage Education Managers to support teachers in the design and delivery of the curriculum.

English Heritage is seeking partnerships with the heritage sector and will provide partnership support centrally. The project will run across England over three years and involve 150 schools in eight different locations, ensuring a geographical spread of urban and rural schools. Participation in the programme will be targeted to ensure resources are directed at children least likely to engage with their local historic environment.

03

INDICATORS SECTION

IN THE TEN YEARS SINCE HERITAGE COUNTS BEGAN IN 2002:



Introduction

Each year *Heritage Counts* analyses a series of indicators on the state of the historic environment. The evidence collected is used by the sector to determine priorities and contribute towards the development of policy.

At www.heritagecounts.org.uk you will find spreadsheets containing trend data for the indicators. The data is available at national, regional and, where possible, local levels.

In this report, we highlight the key findings for 2011/12 and examine how things have changed in the 10 years since *Heritage Counts* began in 2002.

These findings are reported in the sections:

Understanding the assets: data on the extent of historic environment assets

Caring and sharing: data on the condition of assets and resources, including the funding available to manage them

Using and benefiting: data on the social, economic and environmental benefits derived from active use of the historic environment

Key findings this year include:

- the proportion of the adult population visiting the historic environment has reached almost three-quarters (74.3%), and has increased across all socio-demographic groups. It is at its highest level since information on this was first recorded in 2005/06.
- the number of planning and listed buildings consent decisions is broadly unchanged on last year, remaining comparatively low across most of the country at about 435,000 and 29,000 respectively. This is a reflection of the current state of the economy.
- the number of specialist heritage and archaeological staff employed in Local Authorities continues to fall: by 5% on last year.

- the economic situation has also perpetuated the significant drop in the number of trainees and apprentices in historic environment related professions. Numbers have declined by 26% since 2010/11 and by 72% since 2005/06.
- after large reductions in the years since 2008, Heritage Lottery Funding for the sector in 2012 was brought back to roughly 2007 levels – an increase of 35% on last year.

In the ten years since *Heritage Counts* began in 2002:

- the number of planning application and listed building consent decisions has declined by 26% and 10% respectively since 2002. The biggest falls were in 2008/09 and 2009/10 reflecting the impact of the recession.
- the number of specialist heritage and archaeological staff employed in Local Authorities has declined by 10% since 2003 and by 26% since its peak in 2006.
- voluntary activity in the historic environment has increased greatly: The number of National Trust volunteers in the UK have nearly doubled since 2002, increasing from 34,380 in 2002/03 to over 66,000 in 2011/12.
- Heritage Open Days (HODs) continues to grow. Visitor numbers have doubled in size in the past 10 years with visitors over the four-day weekend hitting 1.7m – around half of whom come from lower socio-economic groups.
- the number of students studying topics related to the historic environment increased by 17% between 2011 and 2003, to over 121,000 people (2011 is the latest year data is available).
- English Heritage's Grant in Aid shrunk by 15% in real terms between 2002/03 and 2011/12. English Heritage will receive a further 34% reduction in Grant in Aid over the four years to April 2015.

- the internet and social media platforms are playing an increasingly important role in how the sector engages with its audiences.

UNDERSTANDING THE ASSETS

DESIGNATED HERITAGE ASSETS

Listed Buildings In April 2012, there were 375,588 listed buildings in England, an increase of 4,856 since 2002. The vast majority of entries (92%) are Grade II. The actual number of listed structures will be higher as one designation can often contain multiple buildings. The Institute of Historic Building Conservation (IHBC) has therefore estimated that the figure may be as high as 630,000-895,000.

Scheduled Monuments As of April 2012 there were 19,759 scheduled monuments in England, 412 more than in 2002. A third of scheduled monuments are in the South West (35% – 6,988 scheduled monuments). The counties of Devon and Cornwall alone have 16% (approximately 3,100) of England's scheduled monuments.

Registered Parks and Gardens In 2012 there were 1,617 registered parks and gardens, 126 or 8% more than in 2002.

Historic Battlefields The number of these was unchanged between 2002 and 2012 at 43.

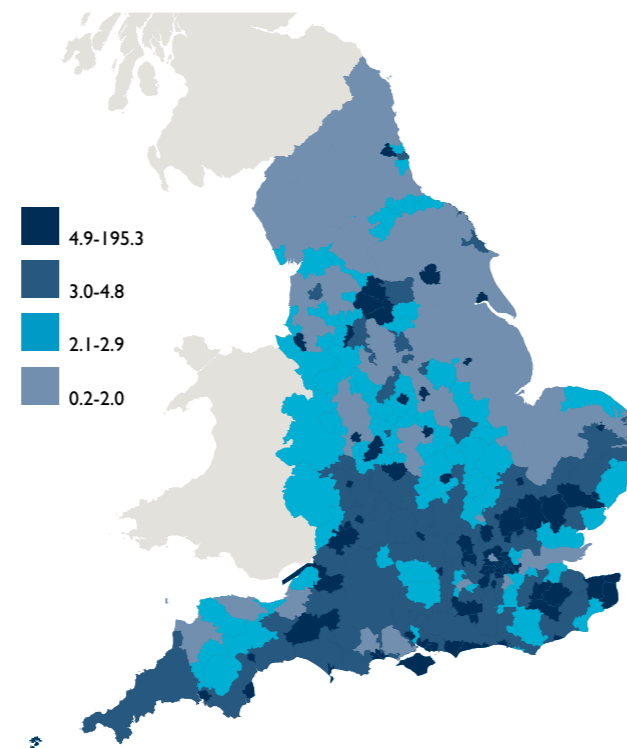
Protected Historic Wreck Sites There were 46 protected wreck sites in England in 2012, unchanged since 2009, though seven more than in 2002. 50% of the sites are in the South West, with the majority in Devon and Cornwall.

World Heritage Sites There were 18 World Heritage Sites in England in 2012, unchanged since 2009, but up from 14 in 2002. There are six English sites on the Tentative World Heritage List.

HISTORIC AREAS AND OPEN SPACES

Conservation Areas There were around 9,800 conservation areas in England in 2012, up from an estimated 9,000 in 2002.

02 Density (per sq km) of Listed Buildings by Local Planning Authority



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Map produced by the English Heritage Projects Team

National Parks and Areas of Outstanding Natural Beauty In 2011/12 1.2m hectares of land (9% of the total land mass in England) were designated as National Parks and 1.9 m hectares (15%) as Areas of Outstanding Natural Beauty.

Heritage Coasts By the end of 2011/12 there were 164 thousand hectares of heritage coasts. These are coastal areas designated by Natural England as being areas of notable natural beauty or scientifically significant.

Ancient Woodland In 2012 0.35m hectares of land in England were classified as ancient woodland.

ACQUIRING INFORMATION ON THE HISTORIC ENVIRONMENT

Historic Environment Records (HERs) HERs are databases of nationally and locally important archaeological sites, historic buildings and landscapes. The increasing availability of online HERs is an important part of improving Heritage Protection. There are currently 84 known HERs in England. Of these, 58 are available online in 2012, up from 48 in 2011 and 19 in 2008. 78% of online HERs are available through the Heritage Gateway website.

Historic Landscape Characterisation Historic Landscape Characterisation is a tool for describing the historic character of places as they are today and how past changes have shaped present day appearance. It is an increasingly useful tool which Local Planning Authorities employ in the decision making process. The proportion of England which has undergone historic landscape characterisation increased from 36% to 93% between 2002 and 2012. In the last year, historic landscape characterisation was completed for the North West, and the West Midlands now has 98% coverage.

CARING AND SHARING

HERITAGE AT RISK

The Heritage at Risk Register is a list of designated heritage assets in England which are considered at risk as a result of neglect, decay or inappropriate development. Grade II buildings are not included in the national register apart from in London.

There are 5,831 assets on the 2012 register (which is as of April 2012). Over half of entries (55%) on the original 1999 at Risk Register have now been removed due to their future being secured – 791 sites in total.

Buildings at Risk

In the last year, 66 sites have been added to the Heritage at Risk Register and 87 removed. In 2012, 926 Grade I and II* buildings (3.0% of all listed buildings at this grade) were at risk. A further 231 structural scheduled monuments and 483 places of worship were also at risk. The number of building at risk entries continues to reduce and now stands at 1,157 – its lowest level since buildings at risk data was first recorded in 1999. It is likely that those buildings which remain on the list long-term are the more problematic ones which will take the greatest effort to rescue. The total conservation deficit for Grade I and II* listed buildings and structural scheduled monuments on the Heritage at Risk Register has gone from an estimated £343 million in 2002 to approximately £423 million in 2012 – a 23% increase.

Scheduled Monuments at Risk

In 2012, there were 3,286 scheduled monuments at risk – 16.6% of all scheduled monuments. Of those, 1,412 (43%) scheduled monuments at risk are found in the South West. This is partly because 35% of all the scheduled monuments in England are found in the South West. Since 2011, 157 sites have been removed and 121 sites have been added to the national register. There are 249 fewer sites on the register now than in the baseline year of 2009.

Registered Parks and Gardens at Risk

6.1% of all registered parks and gardens (99) were on the Heritage at Risk Register in 2012. This is an increase of three on the 2009 baseline when 96 (6.0%) registered parks and gardens were classified as being at risk.

Conservation Areas at Risk

6.6% of all conservation areas surveyed were at risk in 2012, unchanged on 2011, but a slight fall from the baseline in 2010 when 7.4% of conservation areas surveyed were categorised as being at risk.

Registered Battlefields at Risk

There has been no change since 2010 in the number of registered battlefields at risk. In 2012 six (14%) of registered battlefields are at risk, two fewer than the 2008 baseline.

Protected Wreck Sites at Risk

In 2012 four protected wreck sites (8.7%) were on the Heritage at Risk Register. This is a decrease of three since 2011, and six since the 2008 baseline. All four wreck sites at risk are in the South East.

Places of Worship at Risk

2012 was the first time that a comprehensive sample of places of worship was surveyed for risk. 2,771 places of worship were assessed across England and of those 483 (17.4%) were found to be at risk.

World Heritage Sites

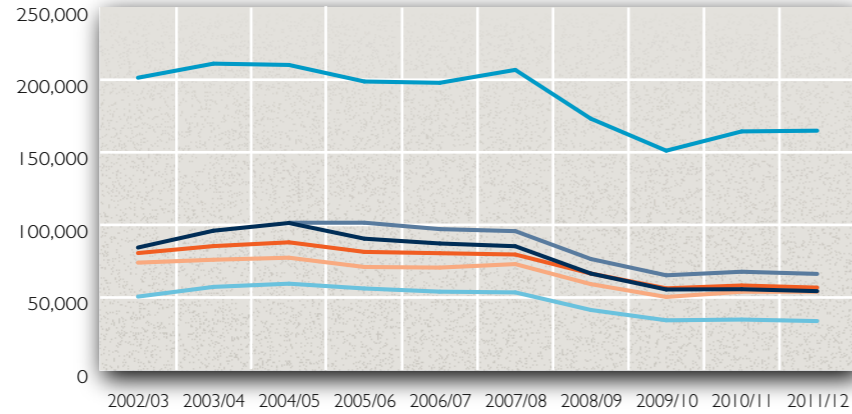
In June 2012 the World Heritage Committee placed Liverpool Maritime Mercantile City on the List of World Heritage in Danger. This is due to the proposed construction of Liverpool Waters, a large scale redevelopment of the historic docklands north of the city centre. The Committee contended that the development will extend the city centre significantly and adversely affect the skyline and profile of the site inscribed on the World Heritage List in 2004. Liverpool is the first UK site ever to be placed on the In Danger list.

MANAGING POSITIVELY

Planning Applications

In 2011/12 there were 434,890 planning application decisions made in England, a decrease of 1% since 2010/11. This is a 26% decrease since 2002/03 and a 33% decrease since the peak of nearly 650,000 application decisions in 2004/5.

03 Planning Applications by General Region 2002/03 to 2011/12



Source: Department for Communities and Local Government

Note: No information available for the East Midlands in 2003-4

The number of planning application decisions has declined since 2002 across all the regions. The largest falls were in the North East (a 35% reduction), North West (36%), East Midlands (35%) and Yorkshire and the Humber (33%). The smallest decline was in London (9%). London and the South East still account for the largest proportion of application decisions, with 18% and 20% of the national total respectively in 2011/12.

Listed Building Consent

There were 29,391 listed building consent decisions in 2011/12 – an increase of less than 1% on 2010/11 – the lowest year since 2002. This is 15% below the nearly 35,000 decisions during the peak of 2004/05.

London was, as in 2010/11, the only region where the number of listed building consent decisions exceeded 2002/03 levels (5% more). The number of consent decisions declined by 26% in Yorkshire and the Humber, 23% in the North West and 21% in the South West over the same period.

The national trend indicates that the number of listed building consents is partly related to the economic context, increasing in years of economic growth, but the relationship may not be as strong as for planning applications more generally.

London, the South East and South West accounted for over half (57%) of all listed building consent decisions in 2011/12, with decisions in Westminster and Wiltshire Councils amounting to 6% and 3% of the national total respectively (1,859 and 819 decisions). Only a small minority, 1% (568) of decisions were for demolition in 2011/12, a slightly lower proportion on previous years.

Conservation Area Consent

3,139 conservation area consent decisions were made in 2011/12. This is a small reduction on last year's figures and is comparable to 2003/04, though still 13% below the peak recorded in 2007/08. The trend across the regions is not consistent. For example, while London still has the largest increase in the number of consents since 2003 (29%), the South West has seen a 30% decline.

Scheduled Monument Consent

988 scheduled monument consent decisions were made in 2012. Since *Heritage Counts* started collecting this data in 2002/03, the number of scheduled monument consents has fluctuated with no clear national trend, a pattern seen across all regions. This suggests that scheduled monument consents are less affected by the economic situation than other types of consents, and that specific development (such as local regeneration schemes or public grant programmes) or non-development drivers (e.g. tree-planting, erecting fences) are more likely to explain changes to the figures than national trends.

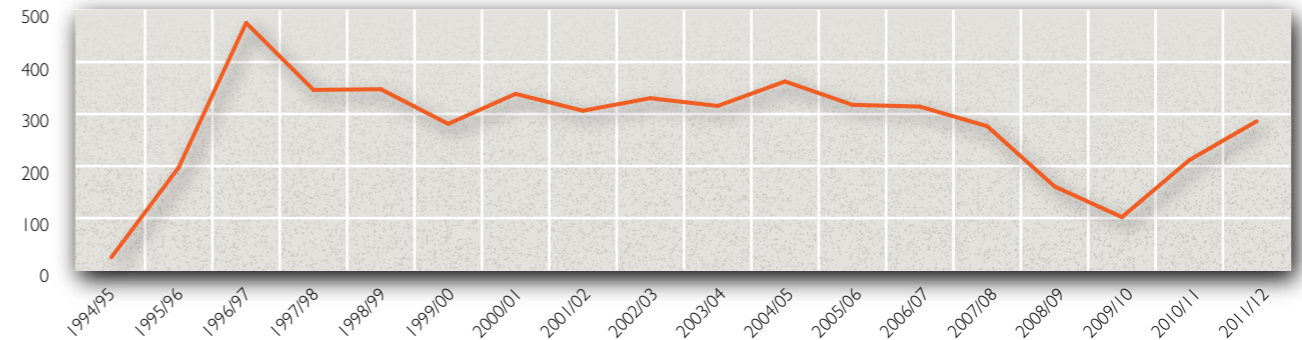
Planning Applications affecting Registered Parks and Gardens

In 2011/12 there were 813 planning applications affecting registered parks and gardens. This is the highest figure since *Heritage Counts* first recorded this data in 2003/04. This year, the number of applications has risen in every region but the North West (where it fell by less than 1%), with Yorkshire & Humber, East Midlands and West Midlands going up by 33%, 27% and 22% respectively.

Management of World Heritage Sites

In 2012, as in the previous five years, all World Heritage Sites in England have management plans.

04 Value of Awards made by HLF since its creation (£m) 1994/5 to 2011/12



Source: Heritage Lottery Fund Note: Numbers are in nominal terms

FUNDING FOR THE HISTORIC ENVIRONMENT

Private sector investment in the historic environment

The great majority of investment in the historic environment comes from private sector businesses and individuals, but no comprehensive trend data on private investment is available. A number of organisations have made estimates for private sector investment. For example the Historic Houses Association (HHA) in 2003/4 estimated that the private sector spends £3.5 billion per annum on historic buildings, with a further survey in 2009 estimating that £139m is spent by HHA members to maintain the historic assets in their care. In 2008 the National Heritage Training Group estimated that £4.7 billion was spent on conservation and restoration of historic (pre-1914) buildings, with £1.7 billion of this on traditional building skills. This figure will include some public sector spend. A 2011 publication *Realising the Benefits of Planning-Led Investigation in the Historic Environment: A Framework for Delivery* estimates that in 2004 £144m was spent by developers on funding archaeological investigations. In 2009/10 Arts and Business estimated that £209m worth of private investment went into the heritage sector, down slightly from £225m in 2008/09.

Heritage Lottery Fund (HLF)

In 2011/12 HLF made £286m in new grant awards. This is around 2007/08 levels, but 35% more than in 2010/11 (£211m) and 181% more than in 2009/10. The low figures in recent years are largely explained by changes to HLF reporting processes, which resulted in a lag in the recording of grant awards to later in the application process. In total 1,234 projects were funded in 2011/12, 13% more than in 2010/11 (1,093).

The total value of grants awarded is 13% lower than in 2002/03 when *Heritage Counts* first collected this data (non-adjusted for changes in value created by inflation) and 30% lower when adjusted for inflation).

The success rate of all applications for 2011/12 was 55%, lower than the average success rate over the lifespan of the HLF (66%). The majority of awards (72%) to date have been for projects up to £50,000. 5% of awards are for sums over £1m, and account for 62% of money disbursed to date.

English Heritage expenditure and income

In 2011/12 English Heritage received £121.2m in Grant-in-Aid, £8.7m less than the previous year and £9.7m less than the £130.9m Grant in Aid in 2009/10 (non-adjusted for inflation). In the 10 years to 2011/12 English Heritage's annual Grant in Aid shrank by 15% in real terms. This has been somewhat offset by increased income from the properties, and so far as possible the effect on frontline services has been kept to a minimum. In line with the 2010 Spending Review, English Heritage's Grant in Aid has been cut by a further 34% up to March 2015.

The organisation made grants worth £30.08m in 2011/12. Between 2002/03 and 2011/12, English Heritage has paid out grants of between £29m and £39m per annum (figures not adjusted for inflation). £73m was spent maintaining and curating English Heritage's National Collection – the 420 sites, monuments, material collections and archives that are held in trust for the nation.

Other public sector sources of funding

Heritage Counts collects data from a number of other organisations related to the historic environment. The Churches Conservation Trust's (CCT) total income in 2011/12 was £6.5m, the majority of which was spent on opening and restoring redundant listed places of worship. 30% of the CCT's Grant in Aid comes from the Church of

England Church Commissioners, and the remainder comes from DCMS. The Listed Places of Worship grant scheme which provides grants totalling the amount of VAT spend on repairing and maintaining listed places of worship gave out approximately £7.6m in 2010/11.

The natural environment sector is an important source of funding for the rural historic environment. Natural England's Environmental Stewardship Scheme (ES) contains a number of programme grants which support the historic environment. Between 2005 and May 2012, £69m was allocated to ES projects which have some sort of positive outcome for the historic environment.

Voluntary sector

The National Trust received £436m in income in 2011/12. Expenditure included £231m for running and maintaining properties and £68m on special projects related to historic buildings and collections. In 2011, the Church of England disbursed £570,000 in grants for listed places of worship and associated buildings. Since 2000 the Church of England has spent a total £7.3m, via 1,971 grants for listed places of worship and cathedrals, supporting projects valued at well over £22m.

EMPLOYMENT AND SKILLS IN THE HERITAGE SECTOR

Number employed directly in the operation of historical sites and buildings

In 2009, the Office of National Statistics' Business Register and Employment Survey estimated that 9,500 people were employed in the heritage sector in England. This figure is likely to be a substantial underestimate: between them, the National Trust and the Historic Houses Association (HHA) members alone employ an estimated 26,000 people

across the UK. In terms of wider employment, in work published in 2010, the HLF estimated 113,000 people were employed in the heritage-based visitor economy in the UK.

Historic environment employment in Local Authorities

Historic environment employment in local authorities was 910 Full Time Equivalents (FTEs) in 2012. This represents a 5% decrease on 2011/12. Whereas until 2010, this decrease was accounted for predominantly by a fall in conservation officers, 2011 and 2012 have seen a fall in the number of archaeological officers.

Total numbers of FTEs have fallen by 10% since 2003, though this masks the size of the fall in employment levels from their 2006 peak: since 2006, the number of FTEs has fallen from 1,224 to 910, a decrease of 26%. Over this period, the number of conservation officer FTEs fell by 30% and archaeological officer FTEs fell by 16%.

Correspondingly, the number of planning applications has gone down by 26% since 2002, (from 585,600 to 434,890). However, applications for listed building consent in that same period have not declined by as much – only 10% nationally.

Archaeological employment

According to the Federation of Archaeological Managers and Employers (FAME), in April 2012 an estimated 6,012 people worked in archaeological employment in the UK, 3,467 in commercial archaeology. This is a decline of nearly 10% since FAME first collected these figures in 2007 although the lowest number was in 2011. The market has not been as comprehensively surveyed since 2007 and it is therefore possible that the decline is larger still.

Commercial archaeology has seen the largest fall in employment levels, with an 8% decline in the number of people employed between April 2011 and April 2012 and a 14% decline since figures were first collected in August 2007. The amount of commercial archaeological work being commissioned closely reflects the fortunes of the development industry, and winter is the traditional season for low levels of construction, spare capacity, and the consequent laying-off of (particularly) casual staff – this is reflected in the employment figures, which tend to fall in the winter. It appears that this tendency has become more marked in recent years, a likely indication of a high sensitivity to market conditions.

According to FAME, some of the larger national archaeology units appear to have developed greater resilience by working more responsively – for example, by temporarily transferring staff from underemployed regional offices to busier locations. There also appears to have been an increase in the formation of joint ventures between units to minimise costs.

Apprentice/Trainee numbers in heritage-related craft skills

According to the Construction Skills Trainee Numbers survey, 2011/12 saw a further decline in the number of apprentice and trainees in heritage-related craft skills – down 26% from 2010/11 to 5,689. In 2011/12 there were 72% fewer apprentices and trainees than when *Heritage Counts* first reported on this data in 2005/06 when the number was 20,157.

Heritage Champions

As of the end of the financial year 2011/12 there were 261 local authorities with Heritage Champions – 74% of all authorities. This is a moderate reduction of 10 since 2011 although still substantially more than 2006 when 54% of local authorities had Champions.

Apprenticeships in the Downturn

ConstructionSkills' Employer Panel, published in October 2011, revealed that 29% of companies had reduced the amount of training they conducted as a result of the economic downturn. A quarter (25%) had changed the way they deliver training and 20% planned to reduce their training budget for 2012. This follows similar decreases reported in November 2010.

Findings from the Employer Panel also show that there has been a considerable fall over the last two years in the number of apprentices employed in the sector – indeed, results suggest the number has halved in the last two to three years.

Reflecting this, a third of employers (30%) had cut back on the planned recruitment of apprentices and levels of recent recruitment have remained relatively low: only about one in six employers (16%) had taken on an apprentice in 2011. The main reason was that they had not recruited at any level (58%). The longer the downturn has gone on, the more difficult it has been for employers to retain staff at pre-recession levels, so the continued drop in training numbers overall is unsurprising. Other reasons were the high cost of employing such staff (17%), their not being considered relevant for the business (11%), their requiring too much supervision and time (10%), having had a bad experience with apprentices in the past (9%) or preferring to recruit experienced staff (8%).

Two thirds of all employers felt there are currently more people wanting to become apprentices than there were positions available across the industry as a whole (68%). Larger firms were the most likely to agree there was an oversupply.

The over-arching issue remains that despite wide-ranging support for apprenticeships from both government, employers and prospective apprentices themselves there is a significant shortage of placements with employers.

05 Change in local authority staffing levels since 2003



Source: English Heritage, IHBC and ALGAO

USING AND BENEFITING

PARTICIPATION IN THE HISTORIC ENVIRONMENT

The latest data from the *Taking Part* survey shows that in 2011/12, 74.3% of adults in England visited at least one heritage site in the last 12 months and an increase of 3.6 percentage points on last year. This is the highest proportion of adults visiting since *Taking Part* began collecting this information in 2005/06 (69.9%). 30.4% of adults reported having visited a heritage site at least three or four times per year, a significant increase on 2005/06 (26.6%).

Since 2005/6 the proportion of people across all ages and economic groups who report having visited a heritage site in the last year has increased significantly. Five socio-demographic groups which experienced an increase between 2005/6 and 2011/12 are:

- Black and ethnic minority groups (up 10.7 percentage points to 61.4%)
- Social rented sectors (up 9.2 percentage points to 55.6%)
- Lower socio-economic groups (up 6.1 percentage points to 63.2%)
- Those aged 75+ (an increase of 6.1 percentage points to 58.2%)
- People with limiting illness or disability (an increase of 3.1 percentage points to 67%)

Between 2005/06 and 2011/12, heritage attendance increased significantly in six of the nine English regions:

- Yorkshire and The Humber (up 6.6 percentage points to 74.8%)
- North East (up 6.3 percentage points to 75.4%)
- West Midlands (up 5.9 percentage points to 71.7%)
- East of England (up 5.6 percentage points to 78.1%)
- London (up 4.9 percentage points to 68.6%)
- South East (up 4.1 percentage points to 80.3%)

Since 2005/06, the proportion of people visiting heritage websites has significantly increased from 18.3% to 28.6%. In 2011, new questions were added to *Taking Part* which tell us more about the purpose of people's website visits. From July 2011 to March 2012, of people who visited a heritage website:

- Over half visited to plan how to get to the historic site (56.7%).
- Half visited to learn about history or the historic environment (51.5%)
- Just under a quarter visited to buy tickets to visit a historic site (24.6%)
- Less than 2% of adults who visited a heritage website used it to discuss history or visits to the historic environment on a forum (1.8%).
- 18.9% of adults had visited a heritage website to take a virtual tour of a historical site.

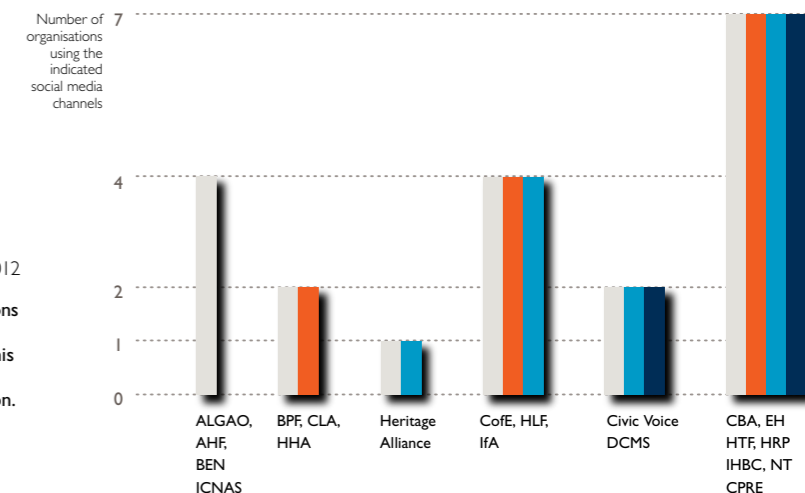
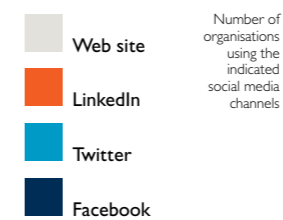
(Note: 'Significant' in the above refers to statistical significance i.e. the change is likely to represent a change in the participation levels of the population as a whole, as opposed to having arisen by chance from the sample the *Taking Part* survey is using.)

SOCIAL MEDIA AND THE HISTORIC ENVIRONMENT

In recent years, social media has transformed the way people and organisations engage with their stakeholders. Social media provides an increasing number of platforms from which organisations can promote their work and build support. These platforms provide a space for discussion, collaboration and campaigning and can be anything from forums, blogs, and networking sites, to video and photo-sharing sites. They can be hosted on home websites or run independently in separate locations.

Conversations are constantly taking place (in many places at once) and individuals are now able to engage directly – and publicly – with organisations large, and small, as never before. Given the numbers involved, the likelihood of there being audiences for the heritage sector on established social media channels is very high.

06 Historic Environment Forum Members Social Media channels



Source: Web presence of HEF Members as at September 2012

NB: Many HEF Members are actually umbrella organisations whose individual members may be very active in social media, for example the Historic Houses Association. This activity is not represented in the chart. For a full list of HEF Members, please see the last page of this publication.

For simplicity, we have focused here on the three main social media platforms:

- Facebook has just over one billion users worldwide. It is used by 32 million people in the UK - slightly more than half the population, and nearly two thirds of all UK internet users.
- LinkedIn, which has sometimes been described as 'Facebook for professionals', has 145m users worldwide and over 8m in the UK.
- Twitter, the message and comment broadcasting site slightly younger than Facebook, has more than 10m active users in the UK, and more than 140m users worldwide.

While most sectoral organisations (and indeed all the bodies represented on the Historic Environment Forum) have a website, there is no standard approach to social media within the heritage sector. Some organisations focus all their effort on one main channel (such as their website), while others take a broader approach, with multiple channels dedicated to their various specialities such as training, events, news and campaigns.

Many independent heritage organisations also use social media as a campaigning tool. For example, the National Trust, the RTPI, the CPRE and others harnessed social media to launch the 'Hands Off our Land' campaign against the draft NPPF which resulted in a 230,000 strong petition.

Heritage Counts will continue to monitor social media use in future.

NUMBER OF VISITS TO HISTORIC ENVIRONMENT ATTRACTIONS

Total visitor numbers to historic sites

According to the VisitEngland Visitor Attractions Survey there were at least 62.3m visits to historic properties in England in 2011. This is an increase of 28% in the ten years since *Heritage Counts* was first published. The overall figure is likely to be higher as this only includes properties which responded to the survey. Visit numbers among properties which responded to the survey in both 2010 and 2011 were up 7%. Gross revenue amongst respondents was also up 5% between 2010 and 2011.

Historic houses attracted the most visits (at least 25.3m in 2011) followed by places of worship (10.5m) and gardens (9.7m). Between 2010 and 2011, the largest percentage growth in visit numbers has been among other historic properties (visit figures rose by 11% between 2010 and 2011) and gardens (up 9%). Since the survey first collected this data in 1989, the largest percentage growth in visit numbers has been to visitor/heritage centres and gardens. Visits to places of worship, on the other hand, have decreased by 17% since the 1989 baseline.

There were 17.5m visits to National Trust staffed properties in 2011/12, up 11% on 2010/11. 5.2m visits were made to English Heritage staffed properties in 2011/12, a 6% drop on 2010/11. The Historic Houses Association reported an estimated 4% increase in visitor numbers to its member properties to 6.9m in 2011 and the Churches Conservation Trust had 1.9m visitors to its sites.

The relative stability in visitor figures over the last couple of years is, in part, likely to be a reflection of the continuation of the 'staycation' trend. Anecdotal evidence suggests that visitor numbers in summer 2012 were adversely affected by the very wet weather. *Heritage Counts* 2013 will report further on these figures.

Heritage Open Days

Heritage Open Days is England's biggest grassroots celebration of local architecture, history and culture and is the largest voluntary event of the year. Started as part of a European Union initiative, Heritage Open Days celebrates what makes local communities and neighbourhoods special.

Curated and delivered locally by a wide range of organisations and drawing on the support of nearly 40,000 volunteers, the programme has more than doubled in size since 2002 with visitor numbers peaking at 1.7m in 2011, and 49% of those attending coming from lower socio-economic groups.

The annual event's growth has been contributed to by:

- a more inclusive concept of heritage coinciding with a general desire to reconnect with history;
- the financial and practical contribution by English Heritage's regional Outreach team from 2003-10;
- a four-year Heritage Lottery Fund supported audience development programme;
- a delivery model where national co-ordination complements local activity and local people take ownership of the event under the umbrella of a nationally recognised brand.

It is this grassroots support that has led to Heritage Open Days' resilience in the face of funding cuts and shrinking capacities both nationally and locally.

With English Heritage's grant aid coming to an end in March 2015, the three partnership bodies, The Heritage Alliance, National Trust and Civic Voice, under whose stewardship the programme currently operates, are exploring a range of options and comparable models across the UK and in Europe to ensure the event's long-term survival.

MEMBERSHIP OF HISTORIC ENVIRONMENT ORGANISATIONS

There were 3.8m National Trust members in 2011/12, up 35% on 2001/02. English Heritage individual membership stood at 810,000 in 2011/12, an 82% rise on 2001/02 and a 7% rise on 2010/11. There were over 34,000 Historic Houses Association friends in 2011, up 39% from 2007 when this data was first recorded in *Heritage Counts*.

VOLUNTEERING IN THE HISTORIC ENVIRONMENT

Each year just over 1% of the adult population volunteer in the historic environment (*Taking Part Survey*). This equates to approximately 470,000 people. Small sample sizes mean it is not possible to make comparisons of volunteering levels over time.

A significant proportion of volunteering is at heritage sites. National Trust volunteer numbers in the UK have nearly doubled since 2002, increasing from 34,380 in 2002/03 to over 66,000 in 2011/12. English Heritage had 830 volunteers this year, mainly based at properties. This is an increase of nearly 30% on 2010 – the first year these figures were recorded. The largest one-off volunteering event in the sector is Heritage Open Days, in which an estimated that 39,000 volunteers took part in 2011.

LEARNING AND THE HISTORIC ENVIRONMENT

Educational visits to historic environment sites

In 2011, an estimated 1.88m formal school visits were made to historic properties in England, though as with visit figures, this figure only applies to properties which responded to the VisitEngland Visitor Attractions Survey, and the actual figure is likely to be higher. Since 2002 the number of school visits to historic properties has increased by 5%.

Over 371,000 educational visits were made to English Heritage properties in 2011/12 (around 30,000 of which were Discovery Visits). This is a 9% decline on 2010/11 and nearly 70,000 fewer educational visits than the peak in 2005/6. At least 300,000 educational visits were made to HHA sites in 2011 and in 2007/08 441,000 educational visits to National Trust sites (the last time this information was supplied for *Heritage Counts*).

The attainment of qualifications relevant to heritage

In the academic year ending 2011 195,200 school pupils took GCSE History and 45,330 History A-Level. In terms of the number of pupils taking History, the number of GCSE pupils was static between 2002 and 2011, while for History A-level the number of students is up 28%. The proportion of students taking History, however, has remained very stable over the last five years with approximately 32% of those sitting GCSEs taking History and 6% of those aged 16-18 sitting A-levels taking History.

Higher Education and the Historic Environment: The Last Decade

According to the Higher Education Statistics Agency (HESA) The total number of students studying topics most related to the historic environment (history, archaeology, architecture, building, landscape design and planning) was over 121,000 in the academic year ending 2011. This is a 3% decrease on the previous year but still a 17% increase on the academic year ending 2003. Whilst the cohort of students in higher education has increased significantly in the last ten years, the percentage of all students in historic environment related subjects has remained relatively stable since 2003 at approximately 5% of all students. This includes undergraduate and postgraduates, and both full/part time students.

Looking at the number of students by individual topic reveals differing trends: While the number of architecture students has risen by 46% and building students by 44% since 2003, the number of archaeology students is down 25%. There may however be some students studying archaeology in more general courses which are not picked up by these statistics.

Universities UK reports an increase in part-time enrolment and a decline in full-time study since 2002. This has not, however, been the trend in subjects related to the historic environment, where full-time enrolment remains strong, particularly in post-graduate studies.

Nationally, there has been a downward trend in the proportion of male students enrolled in higher education, but this is not reflected so clearly in historic environment subjects. Whilst there are more women enrolled in Archaeology, Landscape Design and History, men still dominate in Architecture, Building, Planning and History.

According to the NHTG's research in 2008, nearly two thirds of professionals working in the built heritage sector said that the formal education they received in their original discipline did not prepare them for work on pre-1919 projects. It appears that both students and universities are becoming more aware of this: Graduate employability as an increasingly important factor in a student's choice of subject and institution, and there is an increased demand (and provision) for relevant, practical training.

The 2012/13 academic year will see a rise in tuition fees across England and it will be interesting to see the extent of any impact on student numbers, course provision for historic environment subjects and course selection going forward.

WELL-BEING AND QUALITY OF LIFE

Happiness and participation in heritage

In 2011/12 the *Taking Part* survey contained a question in which those surveyed self-assessed their happiness on a scale between 1 and 10, where '1' was extremely unhappy and '10' was extremely happy. Overall people who had engaged with heritage activities in the past 12 months reported significantly higher happiness scores compared to those who had not (8.0 and 7.6 respectively). Engaging with heritage was also found to increase happiness regardless of income. Although further analysis is needed to adjust for other characteristics that might explain the difference, these findings highlight the value of engaging with heritage in improving levels of happiness in the population.

ENVIRONMENTAL SUSTAINABILITY

The number of empty homes

Standing empty is one of the main reasons historic buildings become 'at risk'. There were approximately 720,000 empty dwellings in England in 2011, a drop of 2% on 2010. 279,000 of these are classed as 'long-term empty' meaning they have been vacant for at least six months. The number of empty dwellings rose every year up to 2008, after which it has declined at a steady rate. This may be a combination of the slowing down of the property market since 2008 and concerted efforts by Government since 2010 to tackle the number of empty homes in England.

HERITAGE COUNTS INDICATORS OVER THE PAST 10 YEARS

Where possible the baseline year is 2002, the first year that an equivalent report to *Heritage Counts* (State of the Historic Environment 2002) was produced. When the baseline was collected on another date this is referenced. Unless otherwise specified the value is based on the situation at the end of the financial year 2011/12 (i.e. 31 March 2012).

UNDERSTANDING THE ASSETS

Indicator	Measurement	Value	Change over the past 10 years (where possible)
Designated heritage assets	Number of world heritage sites (2012)	18	Increase of 4 compared to 2002
	Number of scheduled monuments (2012)	19,759	Increase of 412 compared to 2002
	Number of listed building entries (2012)	375,588	Increase of 4,856 compared to 2002
	Number of registered parks and gardens (2012)	1,617	Increase of 126 sites compared to 2002
Historic areas and open spaces	Number of conservation areas (2012)	9,800 (estimated)	Increase of approximately 800 since 2002
	Area of land in England which is a national park or area of outstanding natural beauty (2012)	3.1m hectares	Relatively stable on 2002
	Extent of ancient woodland (2012)	0.36m hectares	No direct comparison possible because of changes to methodology
Acquiring information	Number of on-line historic environment records (2012)	58	An increase from 19 in 2008
	Extent of historic landscape characterisation (2012)	93%	Increase on 36% of England's land area in 2002

CARING AND SHARING

Indicator	Measurement	Value	Change over the past 10 years (where possible)
Historic environment at risk	Number World Heritage Sites in Danger (2012)	1	First UK site ever to be placed 'in Danger'
	Percentage of Grade I and II* buildings at risk (2012)	3.0%	Decrease from 3.8% in 1999
	Registered parks and gardens at risk (2012)	6.1%	Increase from 6% in 2009
	Scheduled monuments at risk (2012)	16.6%	Decrease from 17.9% in 2009
Managing positively	Number of planning applications decided 2011/12	434,890	Decrease from 585,600 in 2002/03 (26% decrease)
	Number of applications for listed building consent decided 2011/12	29,391	Down 10% on 2002/03
	Number of scheduled monument consent decisions 2011/12	988	No stable trend since 2002/03
	Number of planning applications affecting registered parks and gardens 2011/12	813	Highest figure since 2003/4
	Number of conservation area consent applications determined 2011/12	3,139	No significant change on 2002/03
	Percentage of world heritage sites with management plans in place (2012)	18 out of 18	Increase from 10 out of 14 in 2002
Capacity and resources	Numbers of Historic Environment employees in Local Planning Authorities in England (2009)	910 (Full-time equivalents)	Decrease of 10% since 2003
Developing training and skills	Number of new apprenticeships/trainees in heritage craft skills (2011/12)	5,689	Decrease of 72% since 2005/06
Local Authority Historic Environment Champions	Number of local authorities with Heritage Champions (2012)	261 local authorities with Heritage Champions, 74% of all local authorities	Increase from 54% of all local authorities in 2006

USING AND BENEFITTING

Indicator	Measurement	Value	Change over the past 10 years (where possible)
Participation	Participation in the historic environment (2011/12)	74.3% of all adults visited at least one heritage site in the last 12 months. Participation for the following groups was: Black and ethnic minority groups: 61.4% Lower socio-economic groups: 63.2% Limiting disability or illness: 67%	Statistically significant increases for all groups on 2005/06 baseline
	Number of members of historic environment organisations (2011/12)	National Trust 3.8m English Heritage 0.81m (This figure excludes corporate members)	Increase of 35% in NT members since 2001/02 an 82% increase in English Heritage members
	Number of historic environment volunteers	Approx 470,000 adults	Small sample size means it is not possible to make comparisons over time
Economic benefits	Number of visits to historic visitor attractions (2011)	62.3m	Increase of 28% on 2002. Increase of 7% on 2010
Education and lifelong learning	Number of GCSE/A level history candidates (school year ending 2011)	195,200 GCSE and 45,330 A level candidates	Increase of 1% (GCSE) and 28% (A level) on school year ending 2002
	Number of higher education students studying courses related to the historic environment (Academic Year ending 2011)	121,440	Increase of 17% on academic year ending 2003
	Number of school visits to historic sites (2011)	1,881,000	An increase of 5.1% on 2001
Environmental sustainability	Number of empty homes (2011)	720,000	Increase of 1% on 2004

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