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Economic Impact of Heritage on the Visitor Economy in the Northwest

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1. Overview

1.1 Introduction

The aim of this report is to assess the role that heritage makes in the visitor economy around the North West and to make an estimate of its economic value.

There are, essentially, two fundamental impacts that heritage has on the visitor economy.

The first is in stimulating visits specifically to see a heritage "attraction". We have defined the type of structure that stimulates such a visit as a "landmark".

The second is in providing a backdrop to the provision of experiences. This backdrop typically comes in the form of clusters of heritage buildings that combine to form "townscapes".

These two dimensions are considered separately in this report.

There are also two primary sources of visitor spend, people making day trips from their homes and people who make "staying trips" that involve one or more nights away from home. Their impact has been considered for both landmarks and townscapes.

1.2 Data Sources

Two primary sources of data have been used in the analysis in this report.

NW Day Visitor Survey 2007[1]

The research was conducted over a 12 month period in 2007. It surveyed, via an online panel, 9,800 people who lived within a boundary of approximately 90 minutes from mid points in the region. Its main purpose was to measure the volume and value of day trips in the region. Day trips are defined as visits outside of peoples' "usual environment".

The survey asked people to complete a "diary" recording their movements during a day out within the previous 4 weeks. 2,085 people completed this diary.

[1] Tribal Consulting, Arkenford Ltd and Locum Consulting for the Northwest Regional Development Agency, 2007.

NW Staying Visitor Survey 2007[2]

This was a national survey conducted over a 12 month period via an online panel. It surveyed 10,600 people who had taken a holiday or short break in the UK in the past 12 months.

The research had three elements: a survey of people who had taken holidays and short breaks in the UK in the past 12 months, a survey of people who had taken a holiday or short break in the North West in the past 12 months, and a "diary" type survey asking for detail about a single day of a UK holiday taken in the past 2 months.

The information from the second survey was used to make calculations about the number of trips taken to the North West and to its sub regions, and the information from the third survey was used to estimate the spend per day. In total, this enabled an estimate to be made of the total spend by staying visitors in the region and the sub regions.

1.3 Categorising NW Towns and Cities

Interpreting the results of the research requires a framework for considering the nature of different places in the NW.

The towns and cities in the Northwest can be grouped into categories based on a mix of their size and the "character" determined by the dominant heritage.

Manchester and Liverpool are in a category of their own within the region. They are top 10 UK cities. They are in the same sort of category as other main regional cities: in particular, Birmingham, Cardiff, Glasgow, Nottingham, Newcastle upon Tyne, and Bristol.

Figure 1 shows the towns and cities – excluding coastal towns, Manchester and Liverpool – above a population of about 50,000.

[2] Arkenford Ltd and Locum Consulting for the Northwest Regional Development Agency, 2007.

Figure 1: Small Cities/Large Towns in the NW

	Town	*Population*	*Sub Region*
1	Preston	184,000	Lancashire
1	Bolton	139,000	Greater Manchester
2	Stockport	136,000	Greater Manchester
3	Blackburn	105,000	Lancashire
4	Oldham	104,000	Greater Manchester
5	St Helens	103,000	Merseyside
6	Rochdale	96,000	Great er Manchester
7	Birkenhead	84,000	Merseyside
8	Wigan	81,000	Greater Manchester
9	Warrington	81,000	Cheshire
10	Chester	80,000	Cheshire
11	Burnley	73,000	Lancashire
12	Carlisle	72,000	Cumbria
13	Crewe	68,000	Cheshire
14	Bury	61,000	Greater Manchester
15	Runcorn	60,000	Cheshire
16	Widnes	56,000	Merseyside
17	Macclesfield	51,000	Cheshire
18	Barrow-in-Furness	47,000	Cumbria
19	Lancaster	46,000	Lancashire

Source: 2001 Census, www.statistics.gov.uk

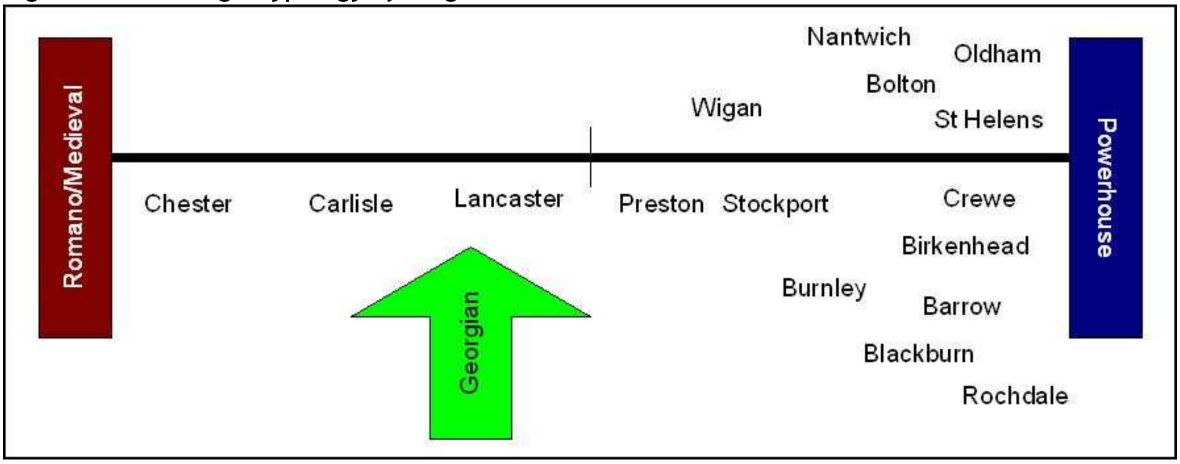
The NW Historic Towns and Cities[3] report suggested that there are two extremes in the "type" of town/small city in the NW, at least in terms of the impression that a visitor might have.

At one end of the spectrum are cities that have a "feel and appeal" to a visitor that is pre-Industrial Revolution in nature.

At the other end is what were called "Powerhouse" - their ambience is post-industrial Revolution in feel.

[3] Edaw and Locum Consulting for NWDA, 2005.

Figure 2: A Heritage Typology of Large Towns/Small Cities in the NW



This leads to a division into three categories:

"PREMIER LEAGUE" SMALL HERITAGE CITIES

Chester is probably the nearest to the left side of the continuum above.

"FIRST DIVISION" SMALL HERITAGE CITIES

Carlisle is more post-Industrial Revolution in its feel than Chester, but a first-time visitor will be struck by the medieval feel of the Market Place/Cathedral area and its Castle.

The "feel" of Lancaster is Georgian. It is the only town of size in the region that is distinctively Georgian.

"POWERHOUSE" TOWNS AND CITIES

All of the other towns/cities have at least some pre-Industrial Revolution heritage, but they are all Victorian boomtowns and have a predominantly "Powerhouse" feel - albeit several, like Stockport, Wigan and Preston, retain strong evidence of pre-Industrial Revolution times, perhaps to an extent that would surprise a new visitor.

There has now been substantial primary research, using an online survey approach, which has shown how the nature and extent of the heritage on offer in these towns has an impact on their attractiveness as destinations. The first such survey at regional level was undertaken in 2006. It surveyed 2,000 people living in and around the region and asked them, amongst other things, which from a list of 65 places they had been on a "special leisure trip, not including visits to friends and family" in the previous 2 years.

This showed a close correlation between the position on the typology outlined above and the proportion of people who are likely to have been to the place. The nearer the left of the typology, the nearer the top of the table places are likely to be.

Figure 3: % of respondents saying that they had been to the town/city on a "special leisure trip" in the past 2 years

Chester	47%
Lancaster	21%
Preston	18%
Carlisle	17%
Bolton	13%
Wigan	11%
Stockport	10%
Nantwich	10%
Barrow	9%
Birkenhead	8%
Blackburn	8%
St Helens	7%
Oldham	6%
Rochdale	5%
Burnley	5%

NW Market Segmentation Study, 2006.

Further research since that time – especially the NW Day Visit and Staying Visitor Surveys that are used as the primary evidence base in this report – have painted the same picture.

The coastal towns are different in nature, but heritage is an important factor in all of them.

MAJOR RESORT

Blackpool is in a category of its own. It is the only town in the region where tourism remains the dominant part of the economy. Heritage is a very significant part of the experience and the town is seeking World Heritage Site status.

COASTAL TOWNS

The region has a group of towns like Southport, Morecambe, Fleetwood, Lytham-St Annes, Grange-over-Sands and Hoylake-West Kirby, all of which were once major resorts but in which tourism is now much less of a presence. Southport is particularly interesting because of the quality and extent of its heritage.

1.4 Summary of Visits and Visitor Spend Motivated by Heritage

As mentioned above, when considering expenditure by "tourists", it always falls into two primary categories: spend by people taking day trips from home, and spend by people who are visiting from somewhere else and spend at least one night. The expenditure assessments in this report follow that split and, in turn, are divided between expenditure stimulated by visits to landmarks and to townscapes.

Day Visit Spend

The NW Day Visits Survey estimated that about 240,000 million day trips were taken in the NW in 2007, entailing expenditure of about £6.5 billion[4].

40% of this was estimated to originate from people who lived outside of the region.

It is estimated that about 15 million day trips a year involve a visit to a landmark heritage attraction, and about 8 million could be said to be directly motivated by a visit to that attraction. The estimated total spend that is motivated by visits to landmarks is estimated to be about £130 million annually, with about £50 originating from outside the region.

A larger number of day visits than this, however, are affected by heritage. Towns and cities with a character that is strongly influenced by heritage are demonstrably more attractive as destinations for many types of activity than those are not. Activities that are particularly likely to be influenced by heritage are general day out, special shopping trips, having a meal, and attending a special event. The NW Day Visits Survey estimates that there are about 84 million trips of this type to towns and cities in the NW annually. We have estimated that about 30% of them can be attributed to the impact of heritage townscapes. About £750 million annual expenditure can be attributed to this, about £300 million of which is estimated to originate from outside of the region.

Staying Visit Spend

The NW Staying Visitor Survey estimated that there are about 17 million leisure trips to or within the NW that involved at least one night away from home in 2007, about 80% of them originating from outside of the North West. They entailed expenditure of about £3.8 billion in total.

Of this, it is estimated that about £1 billion can be said to be motivated by the impact of heritage townscapes, of which about £800 million originates from outside of the region.

In addition, the NW Staying Visitor Survey estimated that there are about 16 million visits to heritage landmarks by people who are staying in the region on leisure breaks. About 6 million of these can be attributed to visits to heritage landmarks, accounting for about £150 million expenditure per annum. The NW Staying Visitor Survey estimated that about 20% of these visits were from a holiday base outside of the region, accounting for about £30 million spend in the region.

[4] The volume and value of tourism in the region is also estimated on an annual basis using the STEAM (Scarborough Tourism Economic Assessment Model) which uses different sources of data to make estimates of volume and value. It estimated total day visitor spend in the region in 2006 to be about £6.8 billion.

Summary

Figure 4: Estimate of visitor spend motivated by heritage

	Spend	*Spend from outside the NW*
INFLUENCED BY TOWNSCAPES		
Staying Visits	£1 billion	£800 million
Day Visits	£750 million	£300 million
VISITS TO LANDMARKS		
Day visits from holiday accommodation	£150 million	£150 million
Day visits from home	£130 million	£50 million
TOTAL	£2 billion	£1.3 billion

1.5 Conclusions

The following are key conclusions that can be drawn from this analysis:

- When people think of the heritage sector, they tend to think of individual heritage attractions. They are certainly an important part of the economy in their own right, attracting very large amounts of visitor spend and employing large numbers of people. Their economic significance is dwarfed, however, by the impact that heritage dominated townscapes have. Although there is no way of being sure what this is, the estimates in this report suggest that the economic impact of heritage townscapes is of the order of ten times that of landmark heritage attractions.

- The evidence demonstrates that towns which effectively integrate their heritage with their retail and leisure offer are very much more appealing to people than those which do so to a lesser extent. This is partly because the heritage creates the ambience that people like. It is also partly because the heritage typically provides an opportunity for small independent businesses to flourish. This creates distinctiveness in the offer that people like.

- Heritage areas themselves seldom command the highest rents (although examples, especially from London, shows that they can do, and there are various locations in the region that could learn from this) or host the largest businesses but, without them, towns and cities are seen as clone like and one-dimensional. This is a major challenge for many towns and cities in the region although many, like Stockport, have been working hard on making the most of their conservation areas. Virtually without exception, the towns and cities that are the most attractive destinations – both for people who live locally and for those who live further afield - are those that offer a "mosaic" of different experiences, each of them attractive. Heritage townscapes are typically vital to creating elements of the mosaic that have the most character and do the most to differentiate any town or city from its competition.

2. The Impact of Heritage Landmarks

Two means have been used to estimate the likely impact of heritage attractions in terms of generating visitor expenditure – a "bottom up" approach looking at the visitor numbers of attractions, and a "top down" approach looking at what the NW Day and Staying Visitor Surveys seem to suggest.

2.1 Admissions to heritage attractions in the NW

There are about 32 historic properties in the region that are open to the public and record more than 25,000 visits annually. They are visited by about 3.5 million people, a figure that seems to have gone up by about 25% since 2000.

Figure 5: Historic Properties open to the public in the NW[5]

	Name	Location	Visitors 2000*	Visitors 2006**	Adult Charge 2006
1	Tatton Park	Knutsford	441,896	770,000	£6.00
2	Chester Cathedral	Chester	*565,000*	566,826	£0.00
3	Liverpool Anglician Cathedral	Liverpool	276,112	382,883	£0.00
4	Metropolitan Cathedral of Christ the King	Liverpool	176,444	176,444	£0.00
5	Carlisle Cathedral	Carlisle	173,925	166,134	£0.00
6	Wigan Pier	Wigan	132,902	132,902	£0.00
7	Dunham Massey	Manchester	100,000	100,000	£0.00
8	Quarry Bank Mill (National Trust)	Wilmslow	62,489	105,707	£9.50
9	Muncaster Castle	Cumbria	56,337	86,239	£5.50
10	Lyme Park (National Trust)	Macclesfield	67,770	83,407	£7.60
11	Speke Hall (National Trust)	Liverpool	64,993	79,196	£7.50
12	Manchester Cathedral	Manchester	20,160	75,360	£0.00
13	Dove Cottage	Cumbria	75,000	64,817	£7.50
14	Hill Top Mansion	Windermere	69,265	64,584	£5.20
15	Little Moreton Hall (National Trust)	Congleton	66,448	64,524	£5.50
16	Sizergh Castle (National Trust)	Kendal	42,287	64,379	£7.10
17	Beeston Castle (English Hertiage)	Chester	58,525	59,790	£4.90
18	Cartmel Priory	Cartmel	65,000	55,958	£0.00
19	Carlisle Castle (English Heritage)	Carlisle	61,766	53,403	£4.40
20	Blackburn Cathedral	Blackburn	40,000*	40,000	£0.00
21	Rufford Old Hall	Ormskirk	31,345	36,228	£4.90
22	Norton Priory Museum & Gardens	Runcorn	45,967	35,459	£4.50
23	Birdoswald Fort	Near Carlisle	34,991	35,360	£3.00
24	Bramall Hall	Stockport	38,126	33,254	£4.95
25	Lancaster Castle	Lancaster	26,200	32,500	£5.00
26	Gawsworth House	Macclesfield	38,000	30,000	£4.50
27	Beatrix Potter Gallery	Hawskead	34,018	29,157	£3.60
28	Samlesbury Hall	Preston	28,000*	27,159	£3.00
29	Brantwood	Coniston	32,506	26,413	£5.50
30	Ordsall Hall	Salford	17,070	25,454	£0.00
31	Wordsworth House	Coniston	21,483	24,090	£4.70
32	St Anns Church	Manchester	*5,000*	23,300	£0.00
33	Mirehouse	Keswick	20,810	20,081	£4.00
	Total:		*2,821,835*	*3,471,008*	

Source: Attractions in the UK, VisitBritain.

[5] Presence on the list is determined by whether the visitor figures for the property are recorded in the annual Visit Britain survey. Many are unquestionably missing because, for one reason or another, their admissions have not been recorded in the survey.

There is about the same number of museums with more than 25,000 admissions annually, accounting for about 4 million visits annually, a figure that also seems to have risen by about a quarter since 2000.

Figure 6: Museums in the Northwest

	Name	*Location*	*Visitors 2000**	*Visitors 2006***	*Adult Charge 2006*
1	World Museum Liverpool	Liverpool	*500,000*	513,855	£0.00
2	Museum of Science and Industry	Manchester	289,679	445,273	£0.00
3	Merseyside Maritime Museum	Liverpool	246,457	439,318	£0.00
4	Museum of Liverpool Life	Liverpool	110,761	296,063	£0.00
5	Tullie House Museum and Art Gallery	Carlisle	190,992	273,221	£5.20
6	Manchester United Museum & Tour	Manchester	211,333	232,811	£11.00
7	Imperial War Museum North	Manchester	*29,000*	229,968	£0.00
8	Bolton Museum and Art Gallery	Bolton	166,008	227,289	£0.00
9	Manchester Museum	Manchester	123,426	173,872	£0.00
10	Beatles Story	Liverpool	118,158	144,114	£12.25
11	Towneley Hall Art Gallery & Museum	Burnley	92,777	101,064	£0.00
12	Portland Basin Museum	Ashton-u-Lyme	101,658	90,971	£0.00
13	Grosvenor Museum	Chester	46,851	90,418	£0.00
14	Cumberland Pencil Museum	Keswick	70,337	83,000	£3.00
15	Harris Museum & Art Gallery	Preston	125,000	72,572	£0.00
16	Liverpool FC Museum & Tour	Liverpool	55,000	55,000	£10.00
17	National Conservation Centre	Liverpool	43,666	50,992	£0.00
18	Warrington Museum & Art Gallery	Warrington	64,541	50,182	£0.00
19	The Beacon	Whitehaven	*29,000*	43,375	£4.00
20	Salford Art Gallery & Museum	Salford	43,101	43,101	£0.00
21	Bury Art Gallery & Museum	Bury	49,005	41,980	£0.00
22	Lancaster City Museum	Lancaster	48,941	41,797	£0.00
23	Lakeland Motor Museum	Cumbria	31,137	38,500	£6.00
24	Blackburn Museum and Art Gallery	Blackburn	33,965	34,554	£0.00
25	Stockport Museum	Stockport	*30,000*	32,748	£0.00
26	Penrith Museum	Penrith	*26,000*	26,000	£0.00
27	People's History Museum	Manchester	23,130	25,214	£0.00
28	Botanic Gardens Museum	Southport	30,909	24,349	£0.00
29	Museum of the Manchesters	Manchester	17,083	23,642	£0.00
30	Catalyst, Museum of the Chemical Industry	Widnes	*38,000*	23,336	£4.95
31	Windermere Steamboat Museum	Bowness	24,714	23,000	£3.50
32	Macclesfield Silk Museum & Paradise Mill	Macclesfield	35,345	21,328	£4.10
33	Lancaster Maritime Museum	Lancaster	27,250	20,471	£2.00
	Total:		*3,075,724*	*4,188,913*	

In addition, about 11 galleries host about 2.5 million visits annually.

Figure 7: Visits to Art Galleries in the NW

	Name	*Location*	*Visitors 2000**	*Visitors 2006***	*Adult Charge 2006*
1	The Lowry	Salford	535,248	850,000	£0.00
2	Tate Liverpool	Liverpool	653,789	653,789	£0.00
3	Manchester Art Gallery	Manchester	*250,000*	262,961	£0.00
4	The Walker Art Gallery	Liverpool	78,930	248,107	£0.00
5	Lady Lever Art Gallery	Liverpool	44,782	201,576	£0.00
6	Whitworth Art Gallery	Manchester	136,141	83,858	£0.00
7	Bluecoat Arts Centre	Liverpool	65,000	55,131	£0.00
8	Williamson Art Gallery	Birkenhead	29,513	35,367	£0.00
9	Atkinson Art Gallery	Southport	23,745	31,306	£0.00
10	Astley Cheetham Art Gallery	Stalybridge	7,951	29,434	£0.00
11	Stockport Art Gallery	Stockport	25,323	22,051	£0.00
	Total:		*1,850,422*	*2,473,580*	

And, about 6 gardens that are open to the public have about 300,000 visits annually. They are all historic.

Figure 8: Gardens in the NW open to the public

	Name	Location	Annual Visitors 2000*	Annual Visitors 2006**	Adult Charge 2006
1	Ness Botanic Garden	South Wirral	*80,000*	89,000	£5.75
2	Tatton Park Garden	Knutsford	86,200	*86,200*	£4.00
3	Dunham Massey Garden	Cheshire	37,000	*40,000*	£6.50
4	Arley Garden	Cheshire	*30,000*	31,800	£5.50
5	Cholmondeley Castle Gardens	Cheshire	*20,000*	22,500	£4.00
6	Acorn Bank Garden and Watermill	Cumbria	*15,000*	19,800	£4.00
	Total:		*268,200*	*289,300*	

An additional c.50 attractions with less than 25,000 visits annually account for about 500,000 visits in total.

In combination, heritage related attractions in the region quote, therefore, about 8.5 million visits annually.

Figure 9: Summary of annual visits

	Visits 2006
Museums	3,075,724
Historic Properties	2,821,835
Galleries	1,850,422
Gardens	289,300
Less than 25,000 visits	478,304
Total	8,515,585

Source: Attractions in the UK, VisitBritain 2006.

This only takes into account attractions where it is possible for visitors to be recorded. There are many historic attractions where visitors are not counted either because it is impossible or there is no reason to do so. Evidence from the NW Staying Visitor Survey (see Section 3.3) suggests that about 56% of visits are to attractions where it is possible to spend money (and, therefore, to be counted). This implies that the total number of visits to historic properties of one sort or another, using the published admission figures as a base, might be somewhere in the region of 15 million annually. As discussed below, calculating the same number on a "top down" basis using the results of the NW Day Visit Survey suggests about 14.5 million visits to heritage visits annually by people visiting from home, and an additional c. 6 million by people visiting from a holiday base.

There is a discrepancy of about 5 million visits between the top down and bottom up calculations and the more conservative figure of 15 million visits to heritage properties in the NW annually is probably more realistic.

As discussed below, however, only a proportion of these visits will be the primary motivator for the day out. Others will be incidental to the trip.

2.2 The impact of heritage landmarks in motivating day trips from home

The NW Day Visits estimated that there were about 240,000 million leisure day visits[6] in the North West in 2007. About 40% of them were calculated to have originated from outside of the region.

Respondents to the NW Day Visits Survey were asked to choose one of 11 groups of activity that was their primary reason for taking the day trip.

The survey found that 6% of all trips, spread across all of these 11 activity groups, involved a visit to a heritage attraction.

Figure 10: Proportion of trips (categorised by main purpose of trip) involving a visit to a heritage attraction

Going to a tourist/ visitor attraction	17%
General day out/ explore the area	11%
Undertake a leisure activity	8%
Attend a special event	7%
Total	*6%*
Going out for a meal	3%
Going to the cinema/ theatre/ concert	3%
Visiting Friends and Relatives	3%
Going on a special shopping trip	2%
For a night out	2%
Watch a sports event	1%
Participate in a sports event	0%

Source: NW Day Visits Survey 2007

It is probable that the visit to the heritage attraction had different impact on the motivation to make the trip depending on the category of day trip that it fell into.

It is likely, for example, that the visit to the heritage attraction would have been the primary visitor motivator for those who said that they had taken a day trip to visit a tourist/visitor attraction. It was probably a significant motivator for most of those who said that they had taken a day trip to have a General Day Out/Explore, to Undertake a Leisure Activity, and to attend a Special Event (which would in most cases have been at the attraction), but a lower factor in the considerations of those choosing to take a day out for purposes such as having a meal or going on a special shopping trip.

The Day Visitor Survey estimated the total number of day trips made to the region. It did this by asking respondents to identify all trips made in the previous 4 weeks. From this, it is estimated that about 14.3 million day trips every year involve a visit to some form of heritage attraction. Applying a "motivation factor" to take into account the differing levels of impact that the visit to the heritage attraction would have had on the decision to visit produces an estimate of about 7.85 million annual day visits that are motivated by a visit to a heritage attraction.

[6] Visits "outside of their usual environment".

Figure 11: Annual day visits to NW Heritage Attractions

	Annual day trips	*% of trips including a visit to a heritage attraction*	*Day trips involving visit to heritage attraction*	*% motivation created by heritage attraction*	*Visits motivated by heritage attraction*
Going to a tourist/ visitor attraction	26,949k	17%	4,447k	90%	4,002k
General day out/ explore the area	32,066k	11%	3,463k	50%	1,732k
Undertake a leisure activity	31,739k	8%	2,603k	50%	1,301k
Attend a special event	6,747k	7%	452k	90%	407k
Going out for a meal	18,927k	3%	606k	20%	121k
Going to the cinema/ theatre/ concert	5,004k	3%	135k	20%	27k
Visiting Friends and Relatives	68,334k	3%	1,845k	10%	185k
Going on a special shopping trip	14,394k	2%	302k	10%	30k
For a night out	18,104k	2%	344k	10%	34k
Watch a sports event	11,005k	1%	110k	10%	11k
Total	*233,268k*	*6%*	*14,306k*	*55%*	*7,850k*

Source: NW Day Visitor Survey 2007

Respondents were asked to record their spend at each stage of their day out. This indicated that those who were going primarily to see a heritage attraction spent about £25 per person at the destination.

Figure 12: Spend per visit (at the destination) which involved a visit to a heritage attraction

Main Activity	*Sample*	*Food & Drink*	*Recreation*	*Shopping*	*Other*	*Total*
Total	147	£7.87	£1.81	£9.44	£1.62	£20.74
Going to the cinema/ theatre/ concert	1	£0.75	£0.00	£10.00	£0.00	£10.75
Going out for a meal	5	£18.48	£0.75	£4.16	£0.00	£23.39
VFR	15	£7.55	£3.02	£8.70	£1.42	£20.69
Going to a tourist/ visitor attraction	37	£6.58	£1.53	£15.79	£1.19	£25.09
Going on a special shopping trip	9	£8.44	£0.33	£10.99	£2.18	£21.94
Undertake a leisure activity	19	£7.01	£1.13	£6.71	£4.07	£18.93
General day out/ explore the area	48	£8.50	£2.01	£5.95	£0.51	£16.97
Watch a sports event	2	£2.84	£7.76	£3.10	£0.00	£13.71
Attend a special event	7	£5.18	£0.00	£14.45	£0.13	£19.76
For a night out	4	£6.24	£2.87	£5.49	£10.47	£25.07

Source: NW Day Visitor Survey 2007

Applying this to the volume of trips produces an estimate, from the NW Day Visits Survey, of about £300 million a year spent on day trips that involve a visit to a heritage attraction, and £175 million a year on visits that are *motivated* by going to a heritage attraction (as opposed to being motivated by some other reason with the heritage forming an additional element).

However, matching the "top down" estimate of visits to heritage attractions (from the NW Day Visits Survey) with the "bottom up" estimate from looking at the number of quoted visits to attraction in the annual Visit Britain survey, suggests that the former may overstate the number of visits by about 25%. In consequence, our estimate is reduced to £225 million total spend involving visits to heritage landmarks and £130 million motivated by the heritage.

Figure 13: Spend on day trips which involve visit to a heritage attraction

Main reason for making the day trip	*Spend per person at destination*	*Day trips involving visit to heritage attraction*	*Spend of all trips involving visit to heritage attraction*	*Visits motivated by heritage attraction*	*Spend motivated by heritage attractions*
Going to a tourist/ visitor attraction	£25.09	4,447k	£111,564k	4,002k	£100,407k
General day out/ explore the area	£16.97	3,463k	£58,769k	1,732k	£29,384k
Undertake a leisure activity	£21.94	2,603k	£57,101k	1,301k	£28,550k
Attend a special event	£19.76	452k	£8,932k	407k	£8,039k
Going out for a meal	£23.39	606k	£14,167k	121k	£2,833k
Going to the cinema/ theatre/ concert	£10.75	135k	£1,452k	27k	£290k
Visiting Friends and Relatives	£20.69	1,845k	£38,174k	185k	£3,817k
Going on a special shopping trip	£21.94	302k	£6,632k	30k	£663k
For a night out	£25.07	344k	£8,623k	34k	£862k
Watch a sports event	£13.71	110k	£1,509k	11k	£151k
Total	*£21.45*	*14,306k*	*£306,922k*	*7,850k*	*£174,999k*

Source: NW Day Visitor Survey 2007

2.3 Excursions involving visiting a heritage landmark from a holiday base

The NW Staying Visits survey suggested that about 30% of excursions taken by visitors to the area involve a visit to a heritage site of some sort. This amounts to about 6 million visits annually. People are especially likely to visit a heritage site if they are visiting a town or city[7].

Figure 14: Day Trips involving a heritage attraction taken by people taking a leisure break in the NW with at least one night stay

	Volume (000's)	*Avg no of days involving an excursion/ activity*	*% of trips involving a trip to a heritage attraction*	*Number of tips involving a heritage attraction*
Rural	3,594	1.58	38%	2,130
City	4,719	1.01	36%	1,725
Coastal	4,544	1.06	17%	833
Large Town	1,254	1.34	46%	776
Small Town	2,928	0.93	24%	665
Total:	17,039	1.18	30%	6,052

Source: NW Staying Visitor Survey 2007

Only about 56% of excursions that involved a visit to a heritage attraction actually involved spend at the attraction (although 85% of excursions involved spend of some sort). Many heritage attractions are of the nature that they can be experienced without entering them or paying for anything. This gives an indication of the extent to which the recorded visitor numbers at attractions do not necessarily accurately reflect the number and value of visits to landmark heritage attractions. On average, people spend about £6.40 at the heritage attractions they visited, but this was only about a third of the amount that they spent on

[7] This is assessed on a destination basis in Section 3.2.

the trip as a whole. Those who spent money at the attraction itself spent, on average, a large amount (about £26 per person) at the attraction and also spent a large amount on the trip itself (about £42 per person).

Figure 15: Average spend on excursions that involve a heritage attraction by people taking a leisure break in the NW

Average spend at the destination		*Average spend at the destination by spenders only*	
Food & Drink	£6.37	Food & Drink	£8.18
Recreation	£3.34	Recreation	£8.38
Shopping	£7.12	Shopping	£16.86
Other	£0.60	Other	£8.58
Total:	*£17.43*	*Total:*	*£42.00*
Sample	284		243

Average spend at the attraction		*Average attraction spend by spenders only*	
Food & Drink	£1.58	Food & Drink	£4.31
Recreation	£2.01	Recreation	£6.14
Shopping	£2.68	Shopping	£11.39
Other	£0.11	Other	£4.02
Total:	*£6.38*	*Total:*	*£25.86*
Sample	284		160

Source: NW Staying Visitor Survey, 2007

Given the high average level of expenditure of people who did spend at heritage attractions, it seems likely that most of those trips will have been motivated by the desire to visit that attraction. It has been assumed that 90% of them will have been directly motivated by desire to see the attraction.

By contrast, it seems likely that desire to see the heritage attraction was not the main motivation for a larger proportion of the trips where there was no expenditure at the attraction. It has been assumed that 50% of these trips will have, on average, have been directly motivated by desire to see the attraction.

This produces an estimate of £150 million spent annually on day excursions by people who are visiting heritage attractions while they are taking a leisure break in the region.

Figure 16: Expenditure on excursions which are motivated by visiting a heritage attraction taken by people while they are taking a leisure trip to the NW

Excursions involving heritage:	6,000,000
% with spend at the attraction:	56%
% of trips that were motivated by the heritage attraction:	90%
No of trips motivated by the heritage attraction:	3,024,000
Spend per trip:	£42.00
Total spend by those who spend at the heritage attraction:	*£127,008k*
% with no spend at the attraction:	44%
% of trips that were motivated by the heritage attraction:	50%
No of trips motivated by the heritage attraction:	1,320,000
Spend per trip:	£16.00
Total spend by those who do not spend at the heritage attraction:	*£21,120k*
Total spend:	*£148,128k*

3. The Impact of Heritage Townscapes

It is very difficult to determine with precision the impact that the heritage of a place has in terms of attracting people to it.

Some indication can be gained by the visitors to any heritage attractions that may be there, but only a fraction of any visitors to a place are likely to visit formal attractions. That does not mean that heritage is not important, however, as the evidence below demonstrates.

3.1 Impact of heritage on the desirability of towns and cities as destinations for leisure breaks

The NW Staying Visitor Survey started by asking people to list the 5 destinations in the country that they considered to be "your top 5 destinations in UK for a weekend away, short break or holiday".

This showed very clearly that **places that are known for their heritage are thought very much more highly as places to go than places which are not**.

Figure 17 shows the top 90 towns and cities that were nominated. Towns and cities that are particularly known for their heritage are shaded.

It can be immediately seen how the most well known "heritage" cities like York and Bath are much more popular than much larger rivals than Manchester and Birmingham.

Other than Liverpool and Manchester, Chester and Carlisle are the only two Northwest cities/large towns to appear on the list, with Chester, which is especially famous for its heritage in 9th place, and Carlisle, which is associated with heritage but to a lesser extent than Chester, in 53rd.

Even looking at the relationship between the larger cities suggests that there is likely to be a strong relationship between their heritage and their popularity. The contrast between Edinburgh and Glasgow tells a clear story, but so does other comparisons. Liverpool, for example, which has a World Heritage Site and is known for heritage, had almost twice as many nominations as Birmingham and Leeds, both of which have exceptionally strong retail, leisure and cultural offers but are clearly not perceived to be as attractive as Liverpool[8]. Newcastle is similarly known for combining heritage with a vital cultural offer and similarly achieves a significantly higher level of popularity than cities of similar size that do not.

[8] The research was undertaken before the European Capital of Culture programme and it is likely that Liverpool will have risen in popularity since.

Figure 17: The 90 most popular towns and cities in the UK for a leisure break (excluding London)

1	Edinburgh	1670	22.0%	31	Windsor	38	0.5%	61	Dumfries	14	0.2%
2	York	1231	16.2%	32	Swansea	35	0.5%	62	Reading	13	0.2%
3	Bath	548	7.2%	33	Cheltenham	33	0.4%	63	Winchester	13	0.2%
4	Manchester	500	6.6%	34	Fort William	30	0.4%	64	Dartmouth	13	0.2%
5	Glasgow	403	5.3%	35	Swanage	29	0.4%	65	Kendal	13	0.2%
6	Newcastle	349	4.6%	36	Exeter	29	0.4%	66	Rye	12	0.2%
7	Liverpool	321	4.2%	37	St Andrews	29	0.4%	67	Hull	12	0.2%
8	Cardiff	261	3.4%	38	Dover	28	0.4%	68	Stoke-On-Trent	12	0.2%
9	Chester	255	3.4%	39	Worcester	26	0.3%	69	Preston	11	0.1%
10	Stratford-Upon-Avon	194	2.6%	40	Glastonbury	25	0.3%	70	Doncaster	11	0.1%
11	Oxford	185	2.4%	41	Wye	24	0.3%	71	Buxton	11	0.1%
12	Leeds	172	2.3%	42	Brean Down	24	0.3%	72	Alton	10	0.1%
13	Birmingham	170	2.2%	43	Gloucester	24	0.3%	73	Angel	10	0.1%
14	Bristol	166	2.2%	44	Dundee	23	0.3%	74	Wells	10	0.1%
15	Dublin	149	2.0%	45	Windermere	22	0.3%	75	Matlock	10	0.1%
16	Lincoln	108	1.4%	46	Mull	22	0.3%	76	Coventry	10	0.1%
17	Nottingham	103	1.4%	47	Ford	21	0.3%	77	Colchester	9	0.1%
18	Durham	95	1.2%	48	Burnham	18	0.2%	78	Felixstowe	9	0.1%
19	Belfast	89	1.2%	49	Chichester	18	0.2%	79	Ipswich	9	0.1%
20	Portsmouth	85	1.1%	50	Northampton	18	0.2%	80	Swindon	9	0.1%
21	Plymouth	73	1.0%	51	Stirling	16	0.2%	81	Taunton	9	0.1%
22	Aberdeen	73	1.0%	52	Salisbury	15	0.2%	82	Sunderland	9	0.1%
23	Harrogate	59	0.8%	53	Carlisle	15	0.2%	83	Bradford	9	0.1%
24	Norwich	55	0.7%	54	Bury	15	0.2%	84	Glencoe	9	0.1%
25	Canterbury	49	0.6%	55	Argyll	15	0.2%	85	Iver	8	0.1%
26	Oban	49	0.6%	56	Milton Keynes	14	0.2%	86	Tonbridge	8	0.1%
27	Sheffield	48	0.6%	57	Ludlow	14	0.2%	87	Peterborough	8	0.1%
28	Warwick	48	0.6%	58	Shrewsbury	14	0.2%	88	Stone	8	0.1%
29	Southampton	47	0.6%	59	Malvern	14	0.2%	89	Eton	7	0.1%
30	Wick	47	0.6%	60	Aberystwyth	14	0.2%	90	Christchurch	7	0.1%
									Total:	7,602	100%

Source: NW Staying Visitor Survey 2007.

3.2 Impact of heritage in generating overnight visits to NW destinations

The NW Staying Visitor Survey asked respondents which places they had been to in the region on a leisure staying trip at least once in the past two years. This showed a very strong correlation between heritage and the likelihood that people had visited the place. Almost twice as many people said that they had been to Carlisle than Lancaster for example, and more than twice, in turn, said that they had been to Lancaster than Preston. In almost every place appearing on the list, heritage is either the central part of the appeal of the place or an important part of it.

Figure 18: Places in the NW that respondents said that they had visited on a staying trip at least in the past 2 years

	Trips reported in past 2 years	*% of total*
Lake District	1812	31%
Blackpool	960	16%
Manchester	567	10%
Chester	482	8%
Liverpool	326	5%
Cumbrian Coast	238	4%
Carlisle	204	3%
Southport	185	3%
Kendal	184	3%
Rural Cheshire	155	3%
Lancaster	127	2%
Morecambe	97	2%
Penrith	97	2%
Lytham St-Annes	81	1%
Wirral	76	1%
Eden Valley	69	1%
Rural Lancashire	67	1%
Preston	56	1%
Ribble Valley	40	1%
Clitheroe	31	1%
Forest of Bowland	31	1%
Bolton	25	0%
Wigan	20	0%
Total:	*5,930*	*100%*

NW Staying Visit Survey 2007

As Figure 19 shows, people do not necessarily think that heritage is the main motivation for the trip. There are many different factors involved. It is probable that a large proportion of visits that are motivated by seeing "specific sites" have a heritage influence, but so to will many of the others such as shopping and nightlife.

Figure 19: Stated primary motivation for visiting the destination

Blackpool		The Lake District	
Because of specific sights	37%	For the scenery	72%
A familiar location	32%	Because it feels away from it all	43%
Because of event/ occasion	30%	Because of specific sights	37%
For a specific activity I wanted to do	28%	For a specific activity I wanted to do	30%
Easy to get to from home	23%	A familiar location	29%
Nightlife (clubbing & social drinking)	16%	Easy to get to from home	15%
Because it feels away from it all	15%	A new location I hadnt been to before	15%
Someone else chose	13%	Because of event/ occasion	14%
Evening entertainment e.g. show/cinema	12%	Someone else chose	13%
For the scenery	11%	To see friends / relatives	13%
To see friends / relatives	10%	For specific hotel/ accommodation	12%
For specific hotel/ accommodation	10%	Attracted by a promotional offer	3%
A new location I hadnt been to before	9%	For the food	3%
Attracted by a promotional offer	7%	For the shopping	2%
For the food	6%	Evening entertainment e.g. show/cinema	1%
For the shopping	6%	Nightlife (clubbing & social drinking)	1%

Liverpool		Manchester	
Because of event/ occasion	39%	Because of event/ occasion	53%
To see friends / relatives	30%	To see friends / relatives	33%
Because of specific sights	27%	For a specific activity I wanted to do	27%
A familiar location	24%	A familiar location	24%
For a specific activity I wanted to do	23%	For the shopping	21%
Easy to get to from home	15%	Easy to get to from home	18%
A new location I hadnt been to before	15%	Evening entertainment e.g. show/cinema	17%
Someone else chose	13%	Because of specific sights	17%
Nightlife (clubbing & social drinking)	12%	Nightlife (clubbing & social drinking)	14%
For the shopping	11%	For the food	9%
For the scenery	8%	Someone else chose	9%
Evening entertainment e.g. show/cinema	7%	A new location I hadnt been to before	7%
Because it feels away from it all	6%	For specific hotel/ accommodation	6%
For specific hotel/ accommodation	5%	For the scenery	4%
For the food	5%	Because it feels away from it all	4%
Attracted by a promotional offer	4%	Attracted by a promotional offer	4%

Carlisle		Lancaster	
For the scenery	31%	A familiar location	20%
Because of specific sights	27%	For a specific activity I wanted to do	19%
Easy to get to from home	22%	Because of specific sights	18%
Because of event/ occasion	22%	Because of event/ occasion	18%
For a specific activity I wanted to do	22%	To see friends / relatives	18%
A new location I hadnt been to before	20%	Easy to get to from home	18%
A familiar location	19%	A new location I hadnt been to before	16%
For specific hotel/ accommodation	18%	For the scenery	13%
To see friends / relatives	17%	Because it feels away from it all	12%
Because it feels away from it all	17%	For specific hotel/ accommodation	9%
Attracted by a promotional offer	11%	Attracted by a promotional offer	6%
Someone else chose	8%	Evening entertainment e.g. show/cinema	5%
For the shopping	5%	For the shopping	4%
For the food	4%	Someone else chose	4%
Nightlife (clubbing & social drinking)	3%	For the food	3%
Evening entertainment e.g. show/cinema	2%	Nightlife (clubbing & social drinking)	3%

Chester	
Because of event/ occasion	23%
A familiar location	22%
Because of specific sights	21%
To see friends / relatives	20%
A new location I hadnt been to before	20%
For a specific activity I wanted to do	16%
For the scenery	16%
For the shopping	15%
Because it feels away from it all	15%
Easy to get to from home	15%
Someone else chose	10%
Attracted by a promotional offer	6%
For the food	4%
For specific hotel/ accommodation	4%
Nightlife (clubbing & social drinking)	3%
Evening entertainment e.g. show/cinema	1%

Looking at what people do in the destinations they are visiting shows how important the heritage element is, however. Not surprisingly, large proportions of visits to heritage cities like Carlisle and Chester involve at least one visit to a heritage attraction, but it is also a major part of the experience for people visiting rural destinations (most significantly, the Lake District) and Powerhouse towns/cities like Preston and Bolton.

Figure 20: Percentage of people who said that they spent "significant time" visiting historic/heritage attractions in the place that they were staying[9]

	Sample	*1*	*2*	*3*	*4*	*At least once*
Carlisle	204	42%	11%	5%	2%	60%
Chester	482	39%	7%	3%	1%	51%
Lake District	1,146	24%	13%	3%	3%	43%
Forest of Bowland	31	20%	5%	14%	0%	39%
Lancaster	127	21%	4%	3%	11%	39%
Liverpool	326	24%	9%	3%	1%	37%
Eden Valley	69	24%	5%	3%	2%	34%
Cumbrian Coast	238	19%	7%	3%	1%	30%
Preston	56	25%	3%	1%	0%	29%
Bolton	25	9%	20%	0%	0%	29%
Rural Lancashire	67	19%	5%	1%	3%	28%
Windermere	435	19%	5%	3%	1%	28%
Wigan	20	14%	12%	0%	0%	26%
Kendal	184	17%	6%	1%	1%	25%
Ribble Valley	40	18%	7%	0%	0%	25%
Manchester	567	18%	4%	1%	0%	23%
Rural Cheshire	155	15%	7%	0%	1%	23%
Keswick	231	13%	3%	3%	1%	20%
Penrith	97	10%	8%	1%	0%	19%
Blackpool	960	10%	3%	1%	2%	16%
Clitheroe	31	13%	2%	0%	0%	15%
Southport	185	10%	4%	0%	0%	14%
Wirral	76	7%	1%	0%	1%	9%
Lytham St Annes	81	5%	1%	0%	0%	6%
Morecambe	97	4%	1%	0%	0%	5%

Source: NW Staying Visitor Survey, 2007

The extent of the heritage is also a major factor in determining whether they are likely to spend time exploring the destination. This is a major factor in the towns and cities that have an extensive heritage townscape and explains their basic appeal.

[9] In addition, they may have visited heritage attractions outside of the area in which they were staying.

Figure 21: Percentage of people who said that they spent "significant time" visiting "exploring/soaking up the atmosphere" in the place that they were staying[10]

	Sample	*1*	*2*	*3*	*4*	*At least once*
Lake District	1,146	29%	14%	10%	14%	67%
Blackpool	960	32%	8%	5%	9%	54%
Carlisle	204	23%	19%	5%	5%	52%
Windermere	435	31%	9%	6%	5%	51%
Keswick	231	33%	8%	3%	6%	50%
Chester	482	35%	5%	4%	3%	47%
Ribble Valley	40	28%	9%	1%	8%	46%
Forest of Bowland	31	29%	4%	12%	0%	45%
Rural Lancashire	67	31%	6%	4%	4%	45%
Eden Valley	69	26%	7%	2%	7%	42%
Southport	185	31%	4%	3%	4%	42%
Cumbrian Coast	238	18%	10%	7%	6%	41%
Kendal	184	17%	15%	4%	4%	40%
Liverpool	326	25%	6%	3%	3%	37%
Lancaster	127	21%	7%	4%	3%	35%
Manchester	567	25%	4%	3%	2%	34%
Morecambe	97	24%	5%	1%	2%	32%
Preston	56	7%	18%	0%	5%	30%
Penrith	97	10%	9%	3%	7%	29%
Wigan	20	26%	3%	0%	0%	29%
Lytham St Annes	81	18%	5%	2%	3%	28%
Clitheroe	31	19%	5%	0%	0%	24%
Rural Cheshire	155	17%	4%	1%	2%	24%
Bolton	25	6%	3%	3%	0%	12%
Wirral	76	8%	1%	0%	0%	9%

Source: NW Staying Visitor Survey, 2007

3.3 Expenditure by Staying Visitors generated by heritage

The NW Staying Visit Survey estimated a total annual spend in the North West by staying visitors on leisure trips of about £3.8 billion annually.

It is impossible to show exactly how much this might be attributable to the impact of heritage, but, given the evidence shown above, it seems not unreasonable to attribute 25% of that to the effect of heritage – whether it be through directly enticing visits or by creating the ambience that entices visits - implying that about £1 billion annually can be attributed to heritage.

[10] In addition, they may have done the same outside of the area in which they were staying.

3.4 Impact of heritage on the desirability of towns and cities as destinations for shopping and leisure day trips

The NW Day Visitor Survey provides substantial information about the number of day trips taken to different places in the North West and the purpose of those trips.

In order to assess whether the extent and nature of the general heritage environment seems to have an impact on the number of people who go to different towns and cities, various comparisons have been made.

3.4.1 Manchester and Liverpool

Comparing the number of day trips that are taken to Manchester/Salford and Liverpool, and the reason that they are taken, shows big differences between the two. Liverpool outperforms Manchester for taking a "General Day Out" and, especially, for visiting tourist attractions. This is likely to be considerably attributable to its heritage and the cultural and leisure offer that is nurtured by its heritage.

It underperforms in terms of special shopping trips (although, the research was undertaken prior to the opening of Liverpool One, which is likely to have redressed the situation considerably). Although to a lesser extent, heritage may also have an impact on this – one of the reasons that Manchester's shopping offer is so attractive, especially for special trips, is the quality and distinctiveness of the shopping offer in and around St Anne Street and Kings Street. Figure 23 has a Goad map showing the occupiers of that area – it is dominated by "up market" brands and quality orientated independents. The quality of the experience there is created by the heritage. The heritage of the Northern Quarter also creates a niche "bohemian" style retail offer that is probably stronger than Liverpool's counterpart in and around Ropewalks.

Figure 22: Comparison of volume and nature of day trips to Liverpool and Manchester

	General day out		*Tourist/ visitor attraction*		*Undertake a leisure activity*	
	Trips	*%*	*Trips*	*%*	*Trips*	*%*
Manchester & Salford	1,565,317	48%	1,237,160	35%	514,873	67%
Liverpool	1,702,549	52%	2,326,935	65%	254,170	33%
Sub total	**3,267,865**	**100%**	**3,564,095**	**100%**	**769,043**	**100%**

	Meal		*Special shopping trip*		*Any purpose*	
	Trips	*%*	*Trips*	*%*	*Trips*	*%*
Manchester & Salford	1,355,138	69%	4,011,619	88%	21,799,193	59%
Liverpool	602,663	31%	543,259	12%	15,082,276	41%
Sub total	**1,957,801**	**100%**	**4,554,879**	**100%**	**36,881,469**	**100%**

Source: NW Day Visits Survey, 2007

Figure 23: GOAD Map of St Anne St/King Street area of Manchester

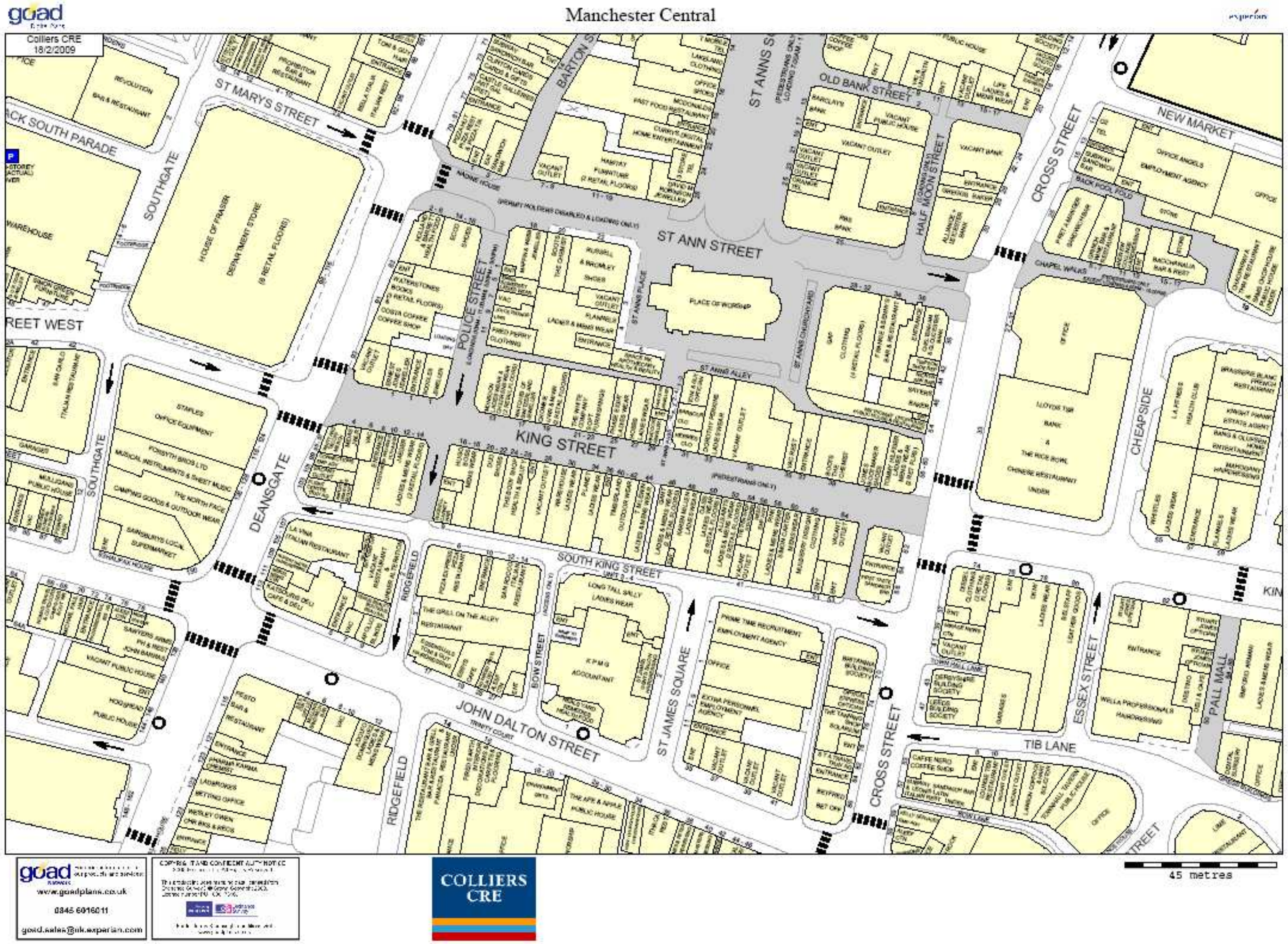


Figure 24: King Street/St Annes St area Manchester

The combination of historic buildings and pedestrianised public realm creates an environment which is attractive to retailers who want to be perceived as a bit "different". It also provides the ambience for people to enjoy "hanging out". The Northern Quarter does the same in Manchester, but in a different style.

3.4.2 Small Cities/Large Towns

Comparison of the results for the small cities and large towns in the region shows the extent to which Chester is in a category of its own as a destination. The survey suggested that it receives about as many "general day out trips" as all the other large towns/small cities combined, and more than all the others for visits which are motivated by seeing an attraction (Chester Zoo is a big factor in this). It also tops the leagues for trips that "involve a leisure activity". The ranking of the destinations again suggests that Lancaster and Chester have a destination appeal that goes beyond what might be expected from their size and locations.

Figure 25: Day visits to small cities/large towns

	General day out			Undertake a leisure activity			Tourist/ visitor attraction		
		Trips	%		Trips	%		Trips	%
1	**Chester**	**2,337,967**	**46%**	**Chester**	**490,073**	**15%**	**Chester**	**1,971,703**	**55%**
2	**Carlisle**	**524,847**	**10%**	St Helens	427,583	13%	**Carlisle**	**417,201**	**12%**
3	Oldham	276,209	5%	Birkenhead	384,990	12%	Preston	268,843	7%
4	**Lancaster**	**274,113**	**5%**	Blackburn	331,388	10%	Bolton	137,087	4%
5	Bolton	273,715	5%	**Carlisle**	**289,557**	**9%**	Bury	127,645	4%
6	Burnley	257,729	5%	**Lancaster**	**278,598**	**9%**	Rochdale	111,358	3%
7	Birkenhead	238,679	5%	Oldham	188,062	6%	Blackburn	95,973	3%
8	Preston	226,260	4%	Bury	182,590	6%	**Lancaster**	**91,094**	**3%**
9	Stockport	144,705	3%	Bolton	124,347	4%	Barrow	56,059	2%
10	Barrow	119,755	2%	Burnley	95,126	3%	Burnley	54,180	2%
11	Bury	89,376	2%	Preston	86,756	3%	St Helens	52,715	1%
12	Crewe	86,368	2%	Stockport	77,889	2%	Stockport	51,776	1%
13	Blackburn	69,079	1%	Widnes	72,825	2%	Birkenhead	48,490	1%
14	St Helens	58,140	1%	Crewe	61,784	2%	Wigan	36,835	1%
15	Wigan	45,770	1%	Rochdale	41,822	1%	Accrington	26,803	1%
16	Accrington	30,768	1%	Wigan	37,119	1%	Widnes	22,619	1%
17	Rochdale	24,591	0%	Accrington	0	0%	Oldham	16,599	0%
18	Widnes	0	0%	Barrow	0	0%	Crewe	0	0%
	Total:	**5,078,072**	**100%**	**Total:**	**3,170,510**	**100%**	**Total:**	**3,586,981**	**100%**

Source: NW Day Visits Survey, 2007

Chester likewise shows dominance over other towns as a place to shop and to eat out. Carlisle also does well in this respect (which is likely to be a factor of it dominating its catchment area in a way that other towns and cities do not). Lancaster does not, which probably reflects the fact that its high street retail and restaurant offer is not strong.

Figure 26: Day visits to small cities/large towns

	Meal			Special shopping trip			Any purpose		
		Trips	%		Trips	%		Trips	%
1	**Chester**	**977,871**	**11%**	**Chester**	**995,682**	**32%**	**Chester**	**8,502,007**	**18%**
2	**Carlisle**	**473,406**	**23%**	Blackburn	361,514	11%	**Carlisle**	**3,799,733**	**8%**
3	Rochdale	444,898	11%	Oldham	348,077	11%	Blackburn	3,555,207	8%
4	Burnley	428,637	10%	**Carlisle**	**344,975**	**11%**	Bolton	3,517,705	7%
5	Oldham	322,223	8%	Preston	191,308	6%	Preston	3,483,943	7%
6	Blackburn	235,830	6%	Stockport	166,714	5%	Oldham	3,360,432	7%
7	Crewe	223,655	5%	Burnley	150,245	5%	Stockport	2,941,321	6%
8	Bolton	223,318	5%	Bury	144,735	5%	Burnley	2,723,945	6%
9	Stockport	219,500	5%	Bolton	134,229	4%	Wigan	2,067,448	4%
10	**Lancaster**	**162,610**	**4%**	Wigan	67,869	2%	Bury	1,956,183	4%
11	St Helens	134,823	3%	St Helens	64,681	2%	Rochdale	1,907,440	4%
12	Preston	108,361	3%	Accrington	43,224	1%	Birkenhead	1,823,852	4%
13	Bury	77,723	2%	Widnes	42,244	1%	**Lancaster**	**1,771,593**	**4%**
14	Birkenhead	71,939	2%	Rochdale	39,047	1%	St Helens	1,653,070	4%
15	Barrow	62,551	1%	**Lancaster**	**29,043**	**1%**	Crewe	1,440,290	3%
16	Widnes	47,904	1%	Crewe	23,115	1%	Accrington	1,055,034	2%
17	Accrington	0	0%	Barrow	0	0%	Widnes	924,455	2%
18	Wigan	0	0%	Birkenhead	0	0%	Barrow	586,137	1%
	Total:	**4,215,249**	**100%**	**Total:**	**3,146,702**	**100%**	**Total:**	**47,069,795**	**100%**

Source: NW Day Visits Survey, 2007

Chester and Carlisle only perform less well than other places in terms of visits to friends and relatives and taking a night out.

Figure 27: Day visits to small cities/large towns

		Visiting Friends/Relatives Trips	*%*		*Night out Trips*	*%*
1	Blackburn	2,083,022	11%	Accrington	619,523	14%
2	Preston	1,786,486	10%	Preston	512,270	12%
3	Oldham	1,615,262	9%	Burnley	464,759	11%
4	Bolton	1,494,189	8%	Bolton	389,724	9%
5	**Chester**	**1,322,013**	**7%**	Wigan	373,383	8%
6	Stockport	1,303,635	7%	Oldham	353,852	8%
7	Burnley	1,243,469	7%	Bury	332,148	8%
8	Rochdale	1,105,009	6%	**Carlisle**	**298,838**	**7%**
9	Wigan	917,539	5%	Stockport	268,063	6%
10	Bury	891,620	5%	**Chester**	**163,743**	**4%**
11	Birkenhead	773,682	4%	Crewe	148,065	3%
12	**Carlisle**	**761,659**	**4%**	Widnes	139,494	3%
13	**Lancaster**	**743,496**	**4%**	**Lancaster**	**109,602**	**2%**
14	Crewe	682,964	4%	Blackburn	94,973	2%
15	Widnes	553,330	3%	Birkenhead	93,825	2%
16	St Helens	486,785	3%	St Helens	41,944	1%
17	Barrow	337,268	2%	Barrow	3,715	0%
18	Accrington	289,475	2%	Rochdale	0	0%
	Total:	**18,390,902**	**100%**	**Total:**	**4,407,921**	**100%**

Source: NW Day Visits Survey, 2007

As Figure 28 shows, there are listed buildings lining its main shopping streets – Watergate Street, Eastgate Street and Bridge Street. The double tier shopping of "The Rows" creates a unique ambience.

The power of Chester as a destination is reflected in the Zone A[11] rental levels, which are considerably higher than for other places of similar size.

[11] The rent applying to the front section of the shop – the standard measure of rental levels.

Figure 28: Listed Buildings in Chester

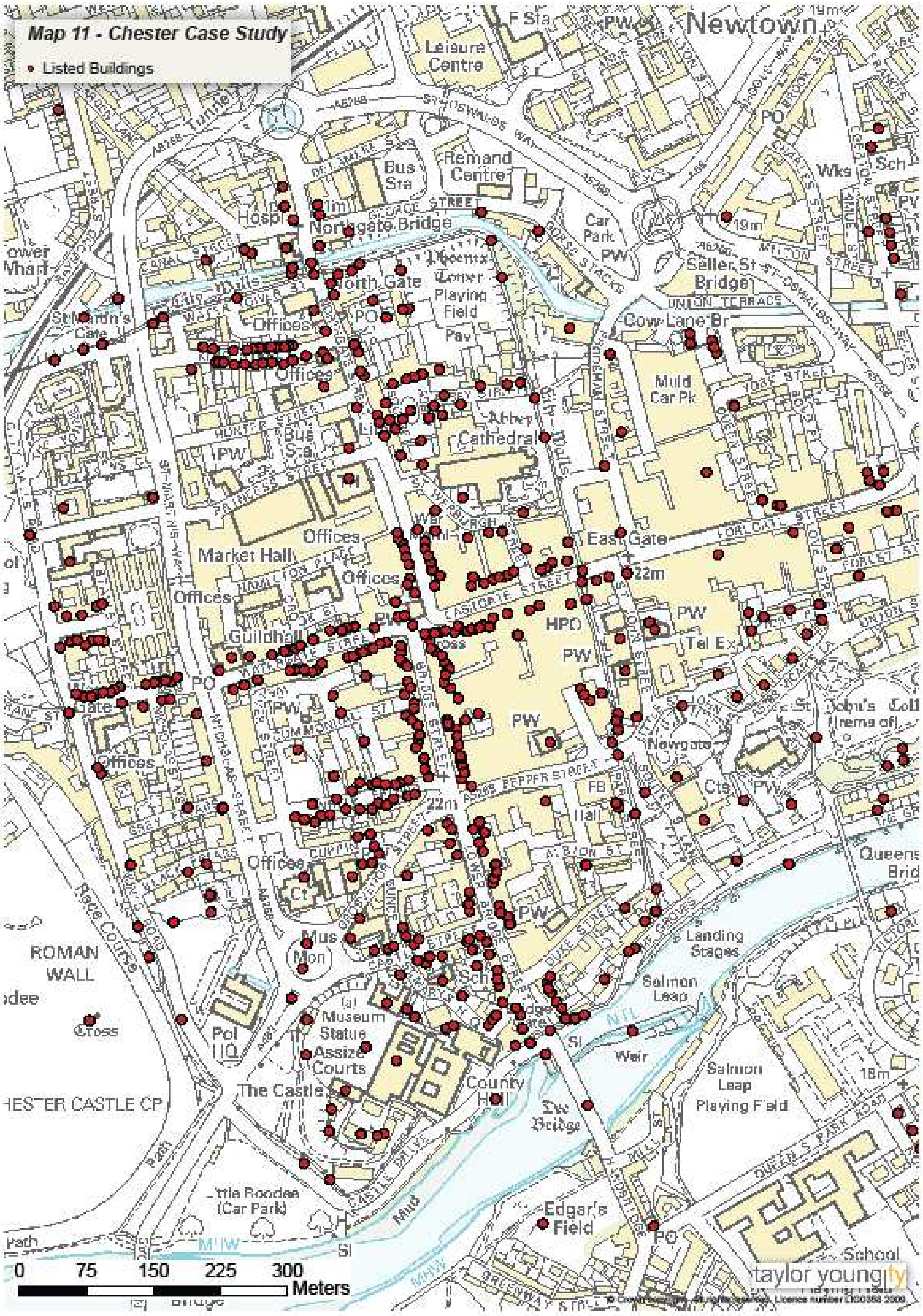


Figure 29: Zone A shop rentals in NW cities and towns

Centre	*Prime Town Centre Rents end 2008 (£psf Zone A)*	*Prime Town Centre Rents end 2008 (Rank out of 200, 1=Best)*
Liverpool	£320	3
Manchester	£295	9
Chester	£210	30
Stockport	£185	41
Bolton	£150	63
Carlisle	£140	70
Preston	£140	70
Blackburn	£135	79
Warrington	£135	79
Bury	£130	92
Lancaster	£115	115
Birkenhead	£110	125
St Helens	£105	133
Oldham	£100	137
Burnley	£95	147
Rochdale	£95	147
Southport	£95	147
Crewe	£70	182
Barrow-in-Furness	£60	192
Retail PROMIS 200 centres average	£141	n/a

Sources: National Survey of Local Shopping Patterns © CB Richard Ellis 2005

© TargetPro, MapInfo

© Oxford Economic Forecasting Ltd 2006

Retail Locations

National Statistics

Local and National Agents

Egi

Property Market Analysis LLP

Local Authority

A visitor survey was undertaken in Chester in 2007. It showed very clearly how important the character of the town and the architecture is the factor that visitors most like about the city.

Figure 30: "What impressed you most about Chester?"

	Total	Type of Trip: Day visit	Overnight UK	Overnight Overseas
Character of the historic town	72%	67%	80%	71%
Architecture / buildings	67%	65%	68%	68%
Everything is in walking distance	55%	56%	58%	49%
City walls	54%	48%	57%	61%
Quality of shops	47%	53%	49%	25%
Atmosphere / ambience	40%	41%	41%	37%
Choice of places to eat or drink	38%	43%	40%	18%
Plenty to do and see	35%	30%	45%	29%
River / riverside	33%	35%	32%	29%
Everything / the whole city	27%	25%	28%	31%
Friendly / helpful people	23%	19%	28%	26%
Green spaces / gardens	17%	17%	15%	21%
Other misc. aspects	1%	1%	1%	1%
Responses:	*1,429*	*657*	*529*	*243*

Source: Chester Visitor Survey 2007-8, Lynn Jones Research

Accepting that Chester is a special case, comparison of Carlisle and Lancaster versus the average of the other large towns/small cities in the region suggests that their heritage gives them substantial advantage as destinations.

Figure 31: Visits to Carlisle and Lancaster (averaged) compared to an average of the "Powerhouse" large towns/city in the region

	Volume	Index vs average	Volume	Index vs average	Volume	Index vs average
	Any purpose		*Meal*		*Tourist/ visitor*	
Carlisle & Lancaster	2,785,663	123%	570,241	259%	254,147	267%
Powerhouse	2,199,764	97%	173,424	79%	73,799	78%
Average:	*2,268,693*	*100%*	*220,108*	*100%*	*95,016*	*100%*
	Special shopping trip		*A leisure activity*		*General day out*	
Carlisle & Lancaster	187,009	148%	284,077	180%	399,480	248%
Powerhouse	118,467	94%	140,819	89%	129,410	80%
Average:	*126,531*	*100%*	*157,673*	*100%*	*161,183*	*100%*

Source: NW Day Visits Survey, 2007

3.4.3 Smaller Towns

In order to see whether the same effect can be traced in smaller towns, all those for which data was collected in the NW Day Visits Survey were divided into those that had a particularly strong heritage orientation to the townscape (16 in total) and those which did not (30 in total)[12]. This suggests that there heritage towns are very much more attractive destinations for taking activities like a general day out, shopping or attending an event.

[12] This has been a largely subjective judgement and is only intended to be indicative. The towns in each category are listed in Figure 50.

They appear to be at least twice as effective for those purposes. The fact that they are less successful for Visiting Friends and Relatives (which is largely population related), demonstrates that the heritage is likely to be the variable making the difference.

Figure 32: Visits to towns that have a particularly strong heritage-oriented townscape compared to those that do not

	Av Trips per town	Index vs Average for all towns	Av Trips per town	Index vs Average for all towns	Av Trips per town	Index vs Average for all towns
	Any purpose		*Tourist/ visitor*		*Special shopping trip*	
Heritage Towns	1,571,814	107%	203,401	167%	118,689	147%
Towns	1,414,350	96%	75,591	62%	59,409	73%
Average towns:	1,471,305	100%	121,820	100%	80,851	100%
	General day out		*VFR*		*Attend a special event*	
Heritage Towns	337,501	151%	357,703	85%	17,484	145%
Towns	158,784	71%	459,403	109%	9,019	75%
Average towns:	223,426	100%	422,618	100%	12,081	100%

3.5 How heritage has the effect of making towns and cities more attractive as destinations for shopping and leisure

Locum Consulting commissioned research on behalf of Sefton Borough Council in 2007 of approximately 1,000 people living within 40 miles of Southport[13].

Respondents were given a list of places in the area and asked which of them was their "kind of place" for a day out shopping.

This showed very clearly that places that have a strong "heritage" offer such as Chester, Southport and Lancaster have an abnormally high level of attractiveness as destinations for shopping.

The respondents were profiled using the Ark Leisure psychographic segmentation model. This categorises people according to the type of leisure experiences that they like. The survey focused on five of the eight Arkenford segments that are the biggest spenders - High Streets, Style Hounds, Cosmopolitans and Discoverers. The core categorisation of the Ark Leisure segmentation relates to the extent to which people prefer experiences that are of a "corporate" disposition or of an "independent" disposition. The five segments listed above move across the spectrum from High Streets being the most corporate in disposition to Traditionals being the least.

Comparing the relative popularity of the large towns/small cities in and around the NW shows that places that have a strong heritage in their town/city centre have relatively

[13] The survey used an online panel and was undertaken by Arkenford Research.

stronger appeal to those of an independent disposition. The reverse is true of the "Powerhouse towns", each of which has a relatively strong high street retail offer. This can be seen most clearly with Bolton. It has a reasonably good High Street offer and comes in 11th place with the High Street segment, but drops down step by step with people who like an offer that is more distinct. Much the same is true of Preston and Wigan, although both of them also have attractiveness to Traditionals, which is probably a function of both having a significant traditional heritage element to their offer.

Figure 33: "My Kind of Place for a Day out Shopping"

	High Streets		*Style Hounds*		*Cosmopolitans*		*Discoverers*		*Traditionals*	
1	Manchester	69%	Trafford Centre	78%	**Chester**	**77%**	Manchester	58%	**Chester**	**65%**
2	**Chester**	**60%**	Manchester	77%	Manchester	76%	**Chester**	**53%**	Manchester	58%
3	Liverpool	56%	Liverpool	69%	Trafford Centre	69%	**Southport**	**49%**	Liverpool	56%
4	**Southport**	**54%**	**Chester**	**64%**	Liverpool	67%	Liverpool	45%	**Southport**	**53%**
5	Trafford Centre	53%	Cheshire Oaks	57%	Cheshire Oaks	59%	Trafford Centre	42%	Cheshire Oaks	38%
6	Cheshire Oaks	45%	**Southport**	**50%**	**Southport**	**56%**	Blackpool	34%	Trafford Centre	28%
7	Blackpool	32%	Ikea, Warrington	37%	Leeds	54%	Cheshire Oaks	31%	Leeds	24%
8	The Quays, Salford	32%	The Quays, Salforc	37%	Ikea, Warrington	45%	Llandudno	25%	**Preston**	**24%**
9	Lytham St. Annes	31%	Leeds	37%	The Quays, Salford	40%	The Quays, Salford	23%	Blackpool	23%
10	**Preston**	**28%**	Blackpool	36%	**Lancaster**	**40%**	**Lancaster**	**22%**	Ikea, Warrington	21%
11	**Bolton**	**26%**	**Preston**	**28%**	Blackpool	40%	Ikea, Warrington	21%	Lytham St. Annes	21%
12	Fleetwood	22%	**Bolton**	**27%**	Llandudno	38%	Leeds	20%	The Quays, Salford	21%
13	Leeds	21%	Llandudno	26%	**Preston**	**36%**	Lytham St. Annes	20%	Llandudno	20%
14	Ikea, Warrington	20%	Lytham St. Annes	24%	Lytham St. Annes	36%	Fleetwood	18%	**Wigan**	**18%**
15	Llandudno	18%	Warrington	19%	**Bolton**	**32%**	**Preston**	**18%**	Fleetwood	17%
16	Botany Bay	18%	Botany Bay	16%	Cheadle Royal	25%	**Bolton**	**16%**	Botany Bay	16%
17	**Wigan**	**17%**	**Lancaster**	**15%**	Fleetwood	24%	Botany Bay	15%	**Lancaster**	**15%**
18	**Lancaster**	**16%**	Fleetwood	15%	Botany Bay	23%	Warrington	14%	**Bolton**	**15%**
19	Warrington	15%	**Wigan**	**13%**	Warrington	22%	**Wigan**	**10%**	Trentham Gardens	14%
20	**St Helens**	**10%**	**St Helens**	**10%**	**Wigan**	**21%**	Formby	7%	Warrington	13%
21	Formby	10%	Trentham Gardens	10%	Formby	20%	**St Helens**	**6%**	**St Helens**	**10%**
22	Cheadle Royal	7%	Blackburn	8%	Trentham Gardens	20%	Blackburn	6%	Blackburn	10%
23	Trentham Gardens	6%	Cheadle Royal	8%	**St Helens**	**19%**	Trentham Gardens	6%	Formby	9%
24	Blackburn	5%	Formby	7%	Blackburn	19%	Cheadle Royal	3%	Cheadle Royal	5%

Source: Southport Catchment Area Survey, 2007.

Much the same pattern emerges when the respondents were asked which destinations that they preferred for a general day out (i.e. not specifically for shopping), except that the advantages of towns and cities that have a strong heritage offer become accentuated.

Lancaster, for example, is about 25% more attractive to the high spend Cosmopolitan segment than Bolton for people living within 40 miles of Southport, but over 60% more attractive for a day out. There is not a significant difference between the two in terms of the number of formal visitor attractions on offer - if anything, Bolton has an advantage in this respect. The difference can only relate to the attractiveness of the environment that Lancaster offers by virtue of its heritage.

Figure 34: My Kind of Place for a Day Out

	High Streets		*Style Hounds*		*Cosmopolitans*		*Discoverers*		*Traditionals*	
1	Manchester	36%	Manchester	46%	**Chester**	**51%**	Llandudno	32%	**Chester**	**37%**
2	**Chester**	**28%**	Trafford Centre	41%	Liverpool	38%	**Chester**	**30%**	**Southport**	**28%**
3	Blackpool	27%	**Chester**	**37%**	Manchester	35%	Manchester	25%	Llandudno	18%
4	**Southport**	**26%**	Liverpool	35%	Trafford Centre	35%	**Southport**	**24%**	Manchester	18%
5	Trafford Centre	17%	**Southport**	**31%**	**Southport**	**33%**	Blackpool	24%	Blackpool	17%
6	Liverpool	17%	Blackpool	29%	Blackpool	31%	Liverpool	20%	Liverpool	15%
7	Cheshire Oaks	16%	Cheshire Oaks	26%	Llandudno	24%	Trafford Centre	19%	Lytham St. Annes	15%
8	**Bolton**	**16%**	Llandudno	19%	Leeds	20%	Cheshire Oaks	15%	Trafford Centre	14%
9	The Quays, Salford	13%	Ikea, Warrington	17%	**Lancaster**	**18%**	Lytham St. Annes	13%	Cheshire Oaks	8%
10	**Lancaster**	**10%**	Leeds	17%	Cheshire Oaks	18%	**Lancaster**	**10%**	The Quays, Salford	8%
11	Llandudno	10%	Lytham St. Annes	15%	The Quays, Salford	16%	Trentham Gardens	7%	Leeds	7%
12	**Preston**	**8%**	The Quays, Salforc	15%	Lytham St. Annes	16%	Formby	7%	**Lancaster**	**7%**
13	Fleetwood	8%	Fleetwood	13%	**Preston**	**12%**	**Wigan**	**7%**	Formby	6%
14	Leeds	7%	**Preston**	**8%**	Ikea, Warrington	12%	Ikea, Warrington	7%	Botany Bay	4%
15	Lytham St. Annes	7%	Botany Bay	7%	Formby	12%	Fleetwood	6%	Trentham Gardens	4%
16	Ikea, Warrington	5%	**Bolton**	**7%**	Fleetwood	11%	The Quays, Salford	6%	**Preston**	**3%**
17	Formby	3%	**Lancaster**	**6%**	**Bolton**	**11%**	Botany Bay	6%	Ikea, Warrington	3%
18	Botany Bay	2%	Warrington	5%	Trentham Gardens	10%	Leeds	5%	**Bolton**	**2%**
19	Trentham Gardens	2%	Formby	5%	Botany Bay	9%	**Preston**	**4%**	Fleetwood	2%
20	**Wigan**	**2%**	Trentham Gardens	5%	Warrington	8%	Warrington	3%	Warrington	1%
21	Blackburn	1%	**St Helens**	**4%**	**St Helens**	**7%**	**Bolton**	**2%**	**St Helens**	**1%**
22	**St Helens**	**1%**	Blackburn	4%	**Wigan**	**6%**	**St Helens**	**1%**	Cheadle Royal	1%
23	Warrington	0%	Cheadle Royal	3%	Cheadle Royal	6%	Cheadle Royal	0%	Blackburn	1%
24	Cheadle Royal	0%	**Wigan**	**3%**	Blackburn	6%	Blackburn	0%	**Wigan**	**1%**

Source: Southport Catchment Area Survey, 2007.

This demonstrates that, not only does a heritage environment make a shopping and leisure area more attractive as a destination, it makes it more attractive to high spending consumer groups, especially Cosmopolitans (who, in addition to being big spenders, are considerably the most active group and the biggest supporters of cultural and heritage attractions) and Discoverers (who are key customers for more eclectic businesses in any town or city).

Figure 35: Average spend on a day trip by different ArkLeisure segments

	Total
Style Hounds	£45.09
Cosmopolitans	£37.95
Discoverers	£32.82
High Street	£30.59
Traditionals	£29.26
Functionals	£24.72
Followers	£24.31
Habituals	£15.20
Total	*£33.92*

Source: NW Day Visits Survey 2007

The way in which this works can be seen by examining research evidence from survey work that was commissioned by Locum Consulting on behalf of Bolton Council in late 2007. It was a survey, via online panel, of about 750 people living within 20 miles of Bolton town centre.

Respondents were asked to identify, from a list, which places that they had been to for shopping in the past year and how often they had been there.

Naturally, a large proportion – about three quarters - had been to Bolton, and almost half of them are frequent shoppers in Bolton. It is clear that Bolton plays an important role within its catchment as a shopping destination.

Other places – like the Middlebook Retail and Leisure Park on the outskirts of Bolton, and the Trafford Centre – are also frequently used for shopping purposes. Convenience and the size and nature of the shops on offer are, obviously, big factors when people decide where they are going to go shopping.

It is striking, however, how high up the list Southport appears, and also how places like Chester and Lancaster are higher up the table than would otherwise be expected given the distance they are from Bolton.

Figure 36: Visits to different destinations for Shopping in the past year

	Have Visited		*Have visited 6 or more times*	
1	**Bolton**	**76%**	**Bolton**	**48%**
2	Manchester City Centre	71%	Manchester City Centre	35%
3	The Trafford Centre	66%	Middlebrook Retail/Leisure Park	33%
4	Middlebrook Retail/Leisure Park	56%	The Trafford Centre	26%
5	Bury	45%	Bury	19%
6	**Southport**	**45%**	Wigan	17%
7	IKEA Warrington	40%	Farnworth	17%
8	Wigan	37%	Horwich	15%
9	Salford Quays	37%	**Southport**	**15%**
10	Preston	34%	Chorley	13%
11	Chorley	32%	Preston	12%
12	Horwich	32%	IKEA Warrington	11%
13	Fleetwood	31%	Westhoughton	11%
14	Farnworth	30%	Walkden	10%
15	Liverpool	30%	Salford Quays	10%
16	Botany Bay	29%	Blackburn	8%
17	Cheshire Oaks	25%	Liverpool	8%
18	Skipton	25%	Fleetwood	7%
19	Blackburn	24%	Rawtensall	6%
20	**Chester City Centre**	**24%**	**Lancaster**	**5%**
21	Walkden	23%	Skipton	5%
22	**Lancaster**	**21%**	Leeds	5%
23	Leeds	20%	Burnley	5%
24	Westhoughton	19%	Rochdale	5%
25	Rawtensall	19%	**Chester City Centre**	**5%**
26	Ostwaldwistle Mills	19%	Warrington town centre	4%
27	Rochdale	18%	Botany Bay	4%
28	Warrington town centre	17%	Cheshire Oaks	4%
29	Harrogate	16%	St Helens	4%
30	Ikea Ashton	16%	Ikea Ashton	3%
31	Burnley	16%	Sheffield	3%
32	Sheffield	16%	Ostwaldwistle Mills	3%
33	St Helens	14%	Harrogate	3%
34	Accrington	12%	Huddersfield	3%
35	Bradford	11%	Accrington	3%
36	Huddersfield	10%	Bradford	2%
37	Cheadle Royal	8%	Cheadle Royal	2%

Source: Bolton Catchment Area Survey, Arkenford Research for Bolton Council, 2007.

As is to be expected, Southport has an even higher position when people were asked about places that they had taken day trips. This shows a very clear demarcation in appeal between towns that are known for their heritage and the "Powerhouse" towns which are not (although it also shows how important Bolton is as a place of recreation to people who live in its surrounds – this is likely to be true of all of the Powerhouse towns).

Figure 37: Places been to on a day trip in the past 12 months

	Have Visited		*Have visited 4 or more times*	
1	Manchester City Centre	66%	**Bolton**	**40%**
2	**Bolton**	**64%**	Manchester City Centre	35%
3	The Lake District	59%	The Trafford Centre	25%
4	The Trafford Centre	59%	Blackpool	19%
5	Blackpool	57%	The Lake District	17%
6	**Southport**	**52%**	**Southport**	**16%**
7	Salford Quays	36%	Wigan	13%
8	Wigan	33%	Preston	12%
9	The Yorkshire Dales	32%	The Yorkshire Dales	11%
10	Preston	31%	Salford Quays	11%
11	**York**	**31%**	Fleetwood	7%
12	Liverpool	31%	Forest of Bowland	7%
13	Fleetwood	31%	Liverpool	7%
14	**Chester**	**30%**	**York**	**6%**
15	Botany Bay	26%	**Lancaster**	**5%**
16	Skipton	26%	**Chester**	**5%**
17	Forest of Bowland	24%	Morecambe	5%
18	Morecambe	22%	Skipton	5%
19	**Blackburn**	**21%**	Botany Bay	5%
20	**Lancaster**	**21%**	**Blackburn**	**4%**
21	Leeds	18%	Leeds	4%
22	Harrogate	16%	Ostwaldwistle Mills	4%
23	Ostwaldwistle Mills	16%	Harrogate	3%
24	Sheffield	12%	Bradford	3%
25	**St Helens**	**11%**	**St Helens**	**3%**
26	**Burnley**	**11%**	Sheffield	3%
27	Huddersfield	8%	**Burnley**	**2%**
28	Bradford	7%	Huddersfield	2%
29	Trentham Gardens	5%	Trentham Gardens	1%

Source: Bolton Catchment Area Survey, Arkenford Research for Bolton Council, 2007.

Southport is a planned town, and Lord Street is its central feature.

Figure 38: The Heritage of Southport

Southport was born out of the 18th century passion for sea-bathing. What started as a hotel at the village of "South Hawes" near Churchtown to serve the needs of these bathers, grew into a town, prospered with the coming of the railways and Victorian affluence, and became one of the nation's most famous, and popular resorts.

The town was founded in 1792 when 'Duke' William Sutton, a publican in nearby Churchtown, built a hotel on what is now the junction of Lord Street and Duke Street.

The name "South-port" first appeared in 1798 due to the use of the small estuary and bay near Sutton's Hotel by local fishermen and boats as a "port". It retained the name in its current spelling from 1826.

Charles Scarisbrick, who acquired all of Southport from the boundary with Birkdale in 1843 to Seabank Road, directed the development of Southport in these years. The policy of the Scarisbrick was to develop Southport exclusively for the middle class. The estate sold leases for large plots of land for villas, with covenants specifying the size and quality of construction.

The coming of the railways at the end of the 1840s gave considerable impetus to the town. It attracted wealthy commuters from Manchester and Liverpool. The town provided exclusivity, fresh air, good shops, churches and an active social life.

The railways also encouraged day visits from workers in the Lancashire industrial areas. They were not necessarily welcomed by the residents.

It was this growing accessibility, from Lancashire, Merseyside and further afield to Scotland that ushered in the golden age of Southport's history. In 1875 it was the second most popular resort in the country, behind Brighton.

Lord Street began to take shape in the 1820s as a number of hotels were developed to service the burgeoning resort. It was initially known as the "main street". The name "Lord Street" is a reference to the Lords Hesketh and Bold (the landowners who collaborated in the development of this part of their estates).

The local topography defined the route of Lord Street, as it was necessary to avoid a series of "dune slacks" (natural pools prone to frequent flooding). The wide gaps between the frontages were probably left to avoid the waterlogged ground in between.

A sea-wall and Promenade were built in 1835 and subsequently the rest of the town centre began to develop in a grid pattern of streets.

Meanwhile, Lord Street evolved slowly throughout the Victorian period to become a linear "grand boulevard". It became the heart of the town as the number of shops and hotels grew and the resort entered its golden era of popularity in the 1880s, when Southport was the third largest seaside resort in the UK.

The grand architecture reflected the aspirations and relative affluence of the town. The ironwork and canopies were a late Victorian, and particularly distinctive addition, followed in the early twentieth century by tarmacking of the strip. This replaced the previous wood-blocking which had been used to dampen noise.

A tram service ran the length of Lord Street, helping the visitors shop, promenade, visit its gardens, and take in performances at Lord Street's parks and bandstands.

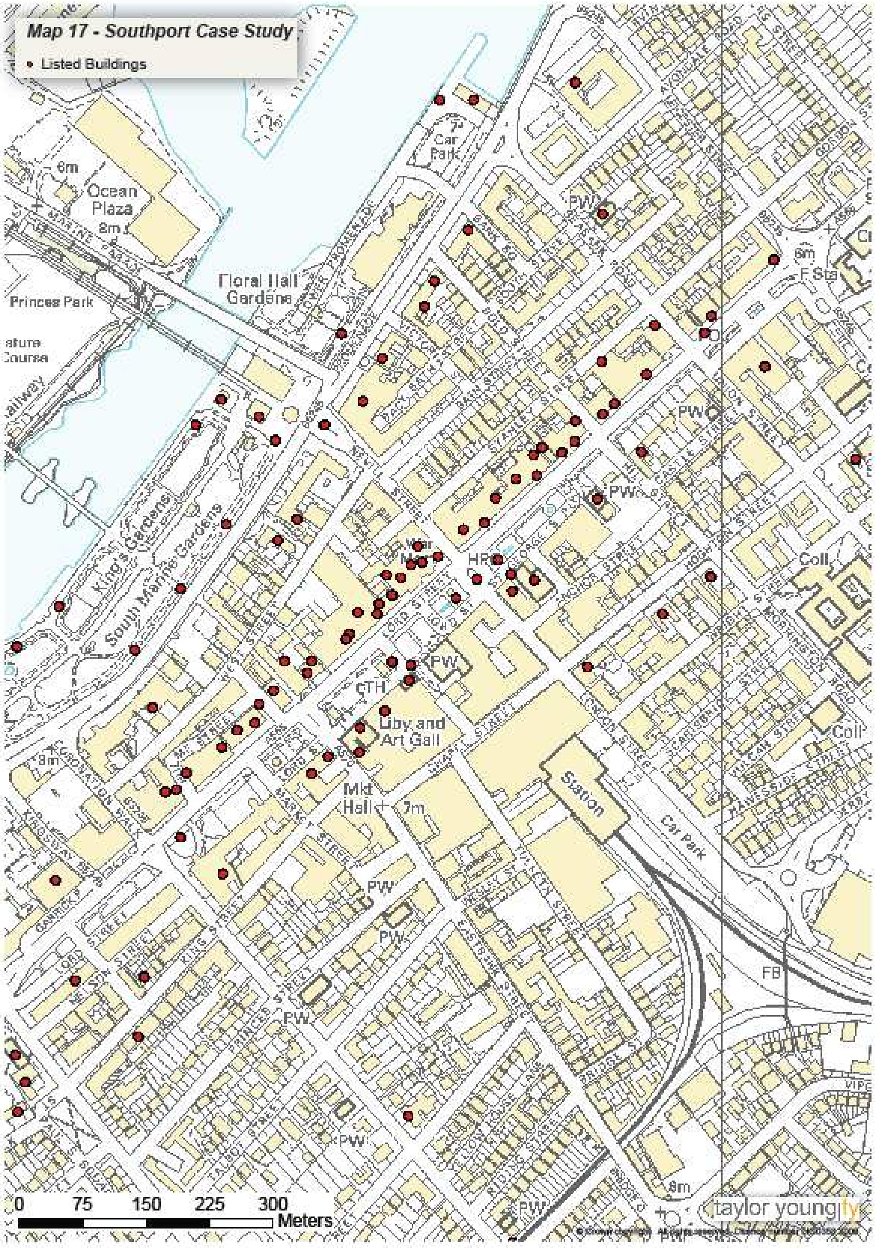
A number of leisure and civic buildings were built during this period, including the winter gardens (on the site currently occupied by the bingo club), a Glacarium (for skating and curling) and the Free Public Library and Art Gallery.

The gardens in the centre of Lord Street were developed during the second half of the 19th Century. The gardens on the east side, from Duke Street to London Street, date from the 1860s and were laid out in a formal Victorian style, with pools and fountains. In 1877 the octagonal bandstand and gardens in front of the Municipal Buildings were added.

Thomas Mawson, a landscape architect employed by the Council, introduced neo-classical features into the Lord Street gardens during the early 20th Century.

As Figure 39 shows, most of the town's listed buildings are clustered around Lord Street.

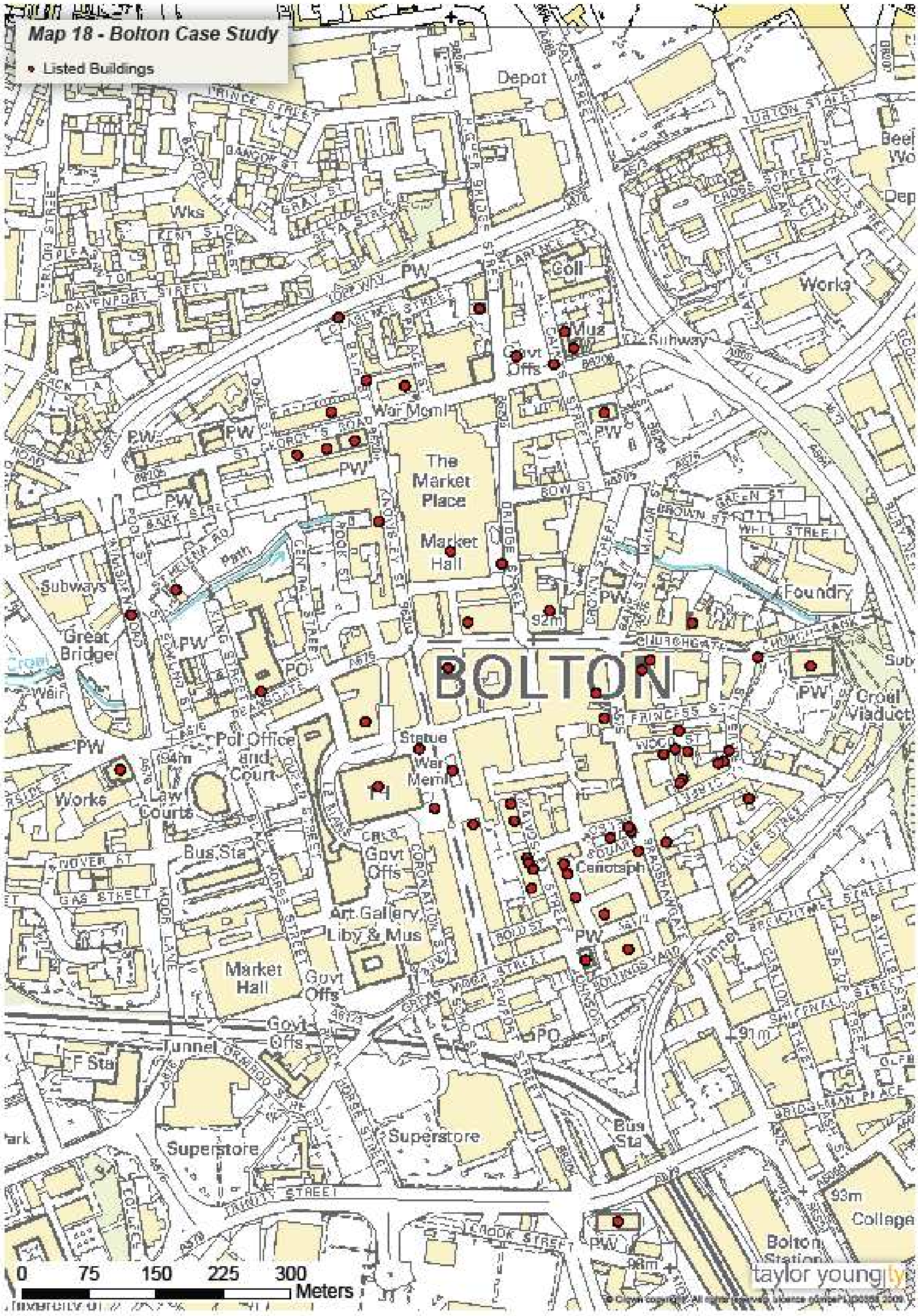
Figure 39: Listed Buildings in Southport



The entire length of Lord Street is occupied in retail and leisure (in the form of cafes and restaurants), although many of the main high street shops are located on Chapel Street, which runs parallel to it.

By contrast, an equivalent mapping of Bolton town centre shows a different pattern. The main shopping areas are separate from the main concentrations of listed buildings (which is focused on the conservation area around Mawdsley Street).

Figure 40: Listed Buildings In Bolton

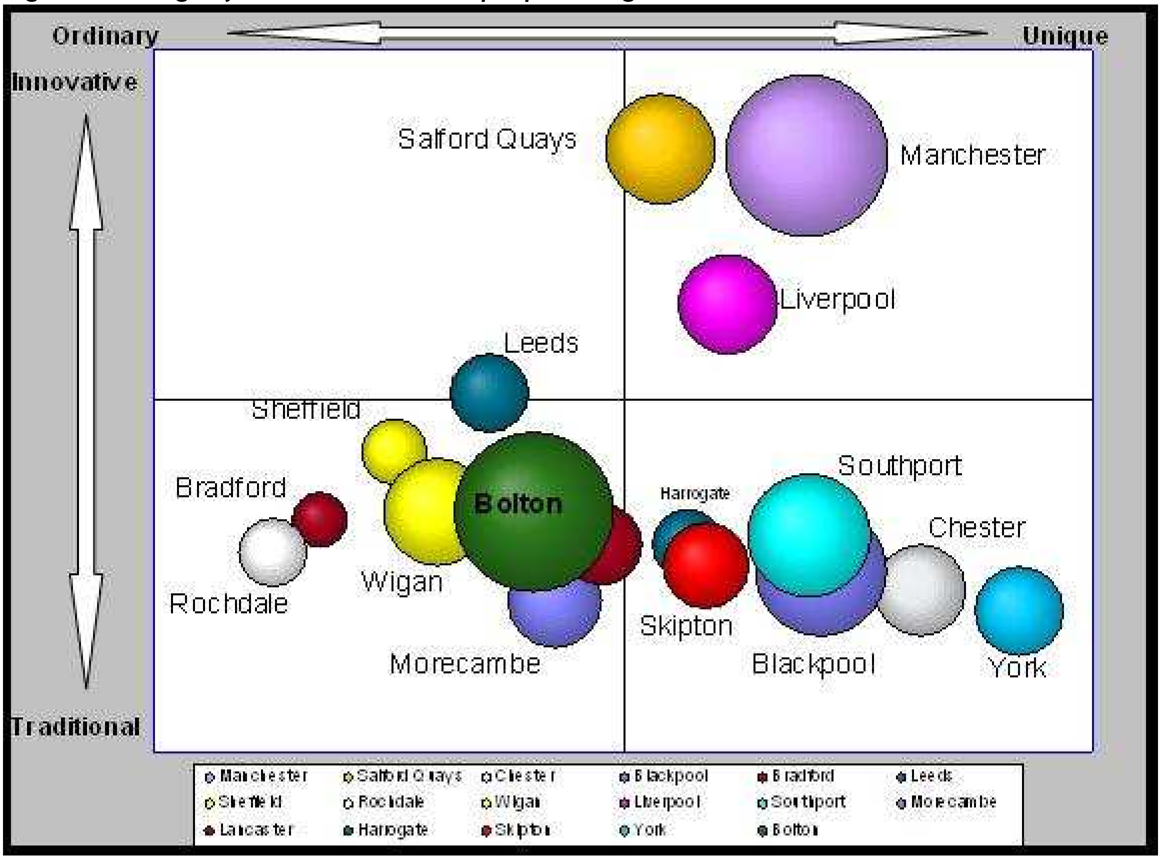


Following the pattern of many other places, the conservation zone has become a main focus of the quality orientated nightlife offer in Bolton and Locum recommended to the Council that it should be a primary focus for trying to nurture a more distinctive retail offer.

The central difference between them and places like Southport, Chester and Lancaster are that, in the latter, the main retail offer is integrated into the main heritage area.

The survey of Bolton asked people to rate a list of towns and cities on a scale of ordinary to unique, and traditional to innovative. This showed clearly that all those with a strong heritage are considered "unique". This is, essentially, what gives them particular appeal.

Figure 41: Image of towns and cities to people living around Bolton



Source: Bolton Catchment Area Survey, Arkenford Research for Bolton Council, 2007.

The effect of this can be demonstrated from the survey undertaken of people living in and around Bolton. It asked people who used a variety of different types of shopping destination why they liked to do so. It was quite clear why they liked Southport for its ambience and selection of distinctive shops.

Figure 42: Why people like to shop at the destination

It is convenient	
Middlebrook	26%
Bolton	21%
Bury	18%
Manchester Centre	13%
Trafford Centre	12%
Southport	**5%**

Good range of high street shops	
Manchester Centre	23%
Middlebrook	22%
Trafford Centre	22%
Bolton	16%
Southport	**13%**
Bury	13%

Interesting small shops	
Southport	**16%**
Bury	11%
Manchester Centre	9%
Bolton	8%
Trafford Centre	6%
Middlebrook	3%

Change of scenery	
Southport	**20%**
Trafford Centre	9%
Bolton	8%
Middlebrook	8%
Manchester Centre	6%
Bury	6%

Like browsing there	
Southport	**20%**
Middlebrook	17%
Trafford Centre	16%
Manchester Centre	15%
Bolton	11%
Bury	11%

Like the ambience	
Southport	**13%**
Trafford Centre	11%
Manchester Centre	8%
Bury	5%
Bolton	4%
Middlebrook	3%

For the market	
Bury	22%
Bolton	15%
Manchester Centre	3%
Southport	**1%**
Trafford Centre	1%
Middlebrook	0%

Good place for meal after	
Trafford Centre	15%
Manchester Centre	13%
Southport	**8%**
Middlebrook	7%
Bolton	4%
Bury	3%

To get a bargain	
Bury	10%
Bolton	9%
Middlebrook	8%
Manchester Centre	7%
Trafford Centre	4%
Southport	**3%**

Source: Bolton Catchment Area Survey, Arkenford Research for Bolton Council, 2007.

The survey of people who lived within 40 miles of Southport provided more evidence of the impact of the heritage in enhancing the appeal of the town. It asked people who had visited Southport exactly where they had been on their last two trips. Lord Street and the seafront were the primary destinations. Only a small number of the people who are attracted to Lord Street are attracted there by a formal "attraction". The importance of heritage to Southport goes far beyond that.

Figure 43: Activities by People visiting Lord Street

Window shopping	20%
Just Exploring	19%
Eating out	18%
Non grocery shopping	13%
Going for a drink	9%
Nothing	6%
Meeting friends/ relatives	5%
Visiting an amusement arcade	2%
Grocery shopping	2%
Visiting an exhibition	1%
Going for a night out / clubbing	1%
Visiting an attraction	1%
Other	1%
Going to an event	0%
Visiting the theatre	0%
Visiting the cinema	0%
Total:	*100%*

Southport Catchment Area Study, 2007

There was a marked difference between what people say they like about Lord Street and what they say they like about nearby Chapel Street, which has the main "high street" offer in Southport

Figure 44: People who have visited the area saying that they "strongly agree" with the statement

	Lord St	*Chapel Street*
It has an atmosphere I enjoy	42%	24%
It is really convenient/easy to use	39%	37%
It has a crowd I feel relaxed with	35%	30%
It is a great place to spend time with my friends/family	34%	26%
It has my kind of shops	17%	28%
It has my kind of entertainment	15%	2%

3.6 The impact of heritage in creating diverse experiences

It is self evident that most towns and cities could not prosper as destinations simply by using historic buildings. This would allow no scope for development and historic buildings do not, typically, provide the modern space requirements that large retailers, restaurants and bars typically require. This is the main reason why modern shopping centres are typically separated from conservation zones.

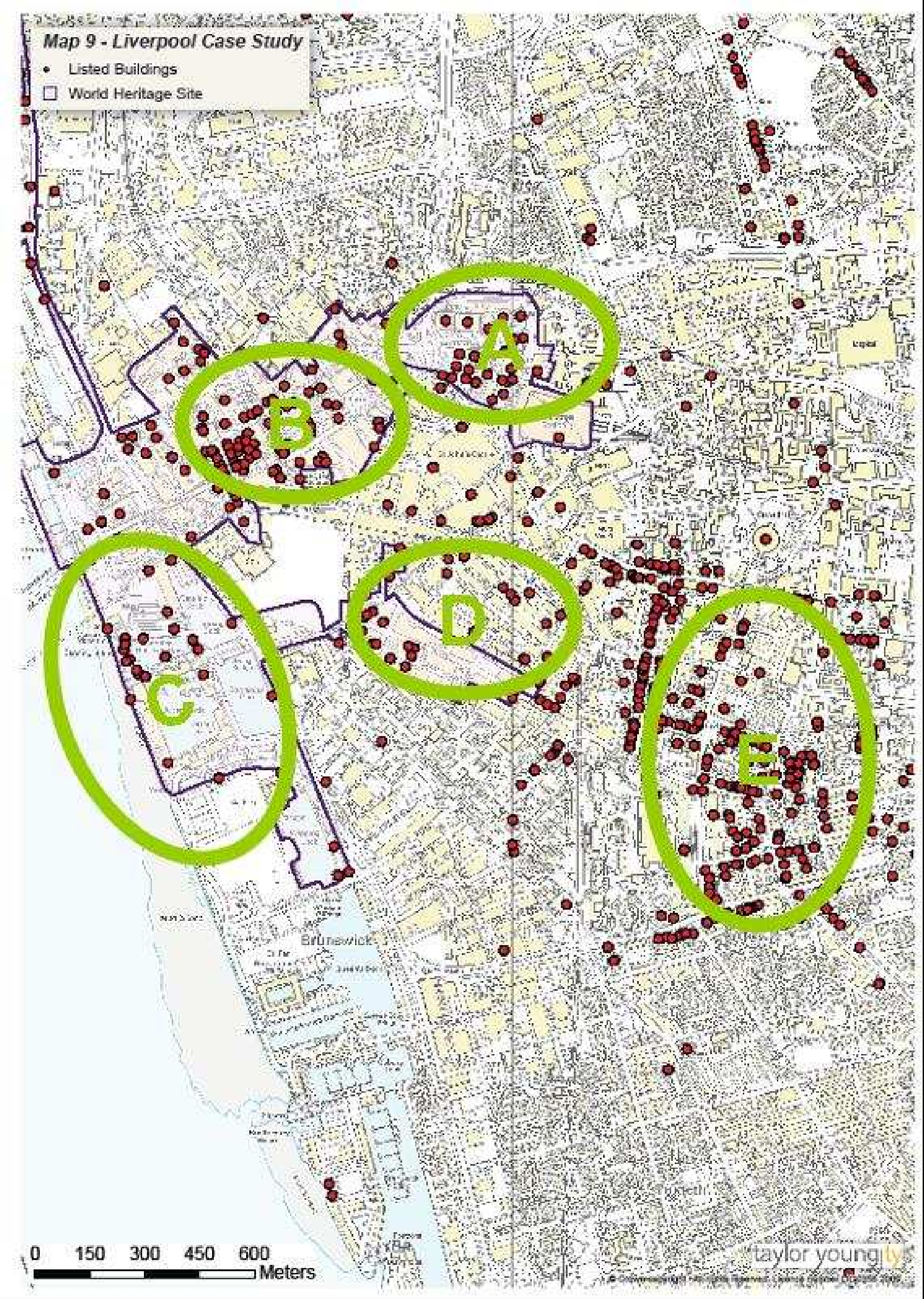
Heritage orientated townscapes, however, are critical in terms of creating certain types of experience. These are essential if a town or city is to have a diversity of experiences.

Liverpool illustrates this. Figure 45 shows the main cultural and leisure hubs in the city centre plotted onto a map which has the city centres' listed buildings marked on it.

It is noticeable that almost all of the city's cultural institutions are located in its heritage clusters, as are its most interesting and highly rated hotels, its restaurant and nightlife clusters, and its niche retail experiences.

Each of the zones identified has a strong cultural offer and a strong nightlife offer. With the exception of the Hope Street Quarter and, to an extent, the Waterfront, they are the location of the most interesting shops in the city.

Figure 45: Main Cultural and Leisure Hubs in Liverpool



- **Zone A: Museum and Theatre Cluster.** The presence of St Georges Hall, the World Museum, the Library, the Walker, the Empire, the Odeon, the restaurants at Queens Square, the Royal Court, the Playhouse, and the Odeon – with Lime Street adjacent to it – creates a "classic" cultural/entertainment area that is potentially exceptional for a regional city.

- **Zone B: World Heritage Site Core.** The core of the Victorian commercial city has some of the most distinctive and attractive elements of the city's visitor offer, including the niche retail offer in the Met Quarter (converted from a listed building) and in the Cavern area, a substantial nightlife offer, and the premier independent hotels A Hard Days Night and 62 Castle Street.
- **Zone C: Liverpool Waterfront**. The co-location of museums, galleries and restaurants in a heritage setting has created one of the premier waterfront destinations in the world.
- **Zone D: Hope Street Quarter.** The Georgian architecture, the Cathedrals, the Everyman, the Unity Theatre, the Philharmonic Hall, Mr Hardman's Photographic Studios, LIPA, the Philharmonic Pub and the new University Design centre is another great collection of attractions and cultural facilities. The presence of the Hope Street Hotel, bistros and the students give it a cosmopolitan feel.
- **Zone E: Ropewalks/Chinatown**. This is another cultural hub area (including FACT, with Bluecoats on the boundary) with the city's main "character retail" cluster on Bold Street and many bars and restaurants of various types.

It is noticeable how distinctive each of these clusters is. The architecture and built environment is very different in each, as is the nature of the cultural, retail and leisure experiences which they host.

The main retail area, which has the highest rental levels, is not located in a heritage cluster. Without it, the city would be much weaker as a destination. This is demonstrated by the evidence that, prior to the opening of Liverpool One, the city considerably underperformed compared to Manchester in terms of overall visitor spend.

Equally, however, the city would be much less effective as a destination if it was not as diverse, as the analysis of the regional day visitor and staying visitor surveys has shown. The success of the 2008 Capital of Culture programme will have enhanced this and would simply not have been possible had it not been for the heritage of the city and its role in nurturing the cultural offer.

Locum Consulting has been working with the North West Regional Development Agency in assessing how towns and cities in the region can nurture this diversity of experience.

The theory underpinning the work is that all towns and cities divide into sections where businesses of different types cluster.

Businesses do this to benefit from critical mass. By locating in proximity to each other, they are able to attract like-minded customers. This is true even of small towns.

Mapping of businesses in a town or city always shows clustering of like- minded businesses that have a common customer base.

Cites and towns that want to develop a truly distinctive and attractive sense of place need to find a way of encouraging interesting and attractive clusters to develop. In other words, they need to nurture a "mosaic" of zones where like-minded businesses cluster.

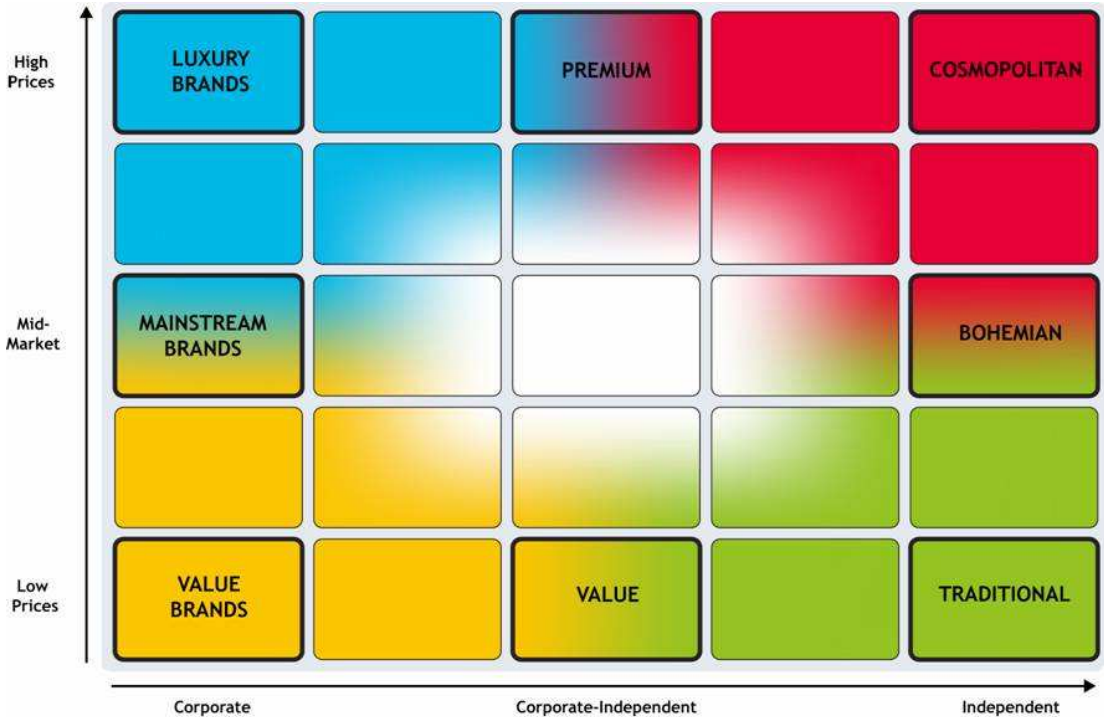
The towns and cities that are most attractive to live, work and spend leisure time in are those that are a mosaic of attractive clusters of distinctive character.

One of the main reasons that these clusters develop is in response to differing consumer preferences. In simple terms, certain types of destination experience attract certain types of customer.

Businesses that seek to attract like-minded customers congregate so that the like-minded customers can find them and have reason to go to where they are.

A framework has been created to provide a tool for assessing the different types of experiences that townscapes offer.

Figure 46: Place Making Framework



Towards the **left-hand** side of the model are parts of towns and cities that are **dominated by corporations**. In other words, the commercial offer – shops, restaurants etc – is dominated by branded chains and the property tends to be owned by larger property companies and financial institutions.

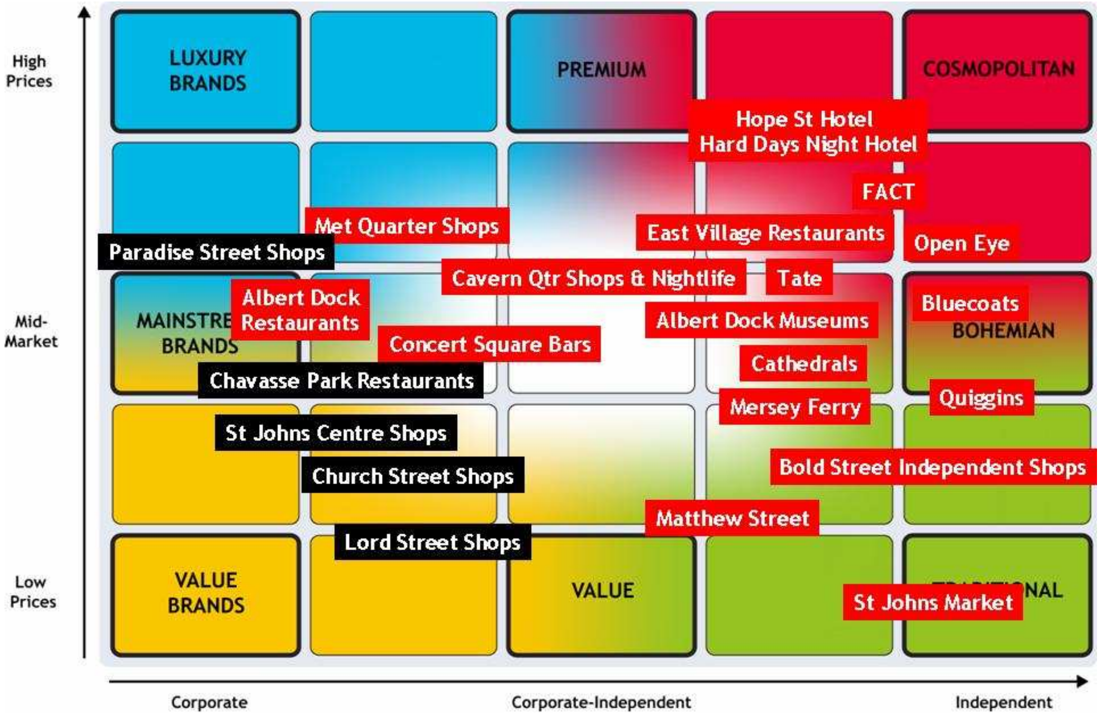
Towards the **right-hand side** of the model are parts of towns and cities that are **dominated by independents** – the commercial offer is dominated by locally owned businesses and the property tends to be in multiple ownership by relatively small companies, many of which are local.

Towards the **top side** of the model are places **dominated by up-market businesses.** Businesses there do not compete on price. Rentals are high.

Towards the bottom side of the model are places **dominated by value-orientated businesses**. Price is a big factor in the way that they position themselves.

Figure 47 plots many of the main "experiences" that are on offer to a visitor to Liverpool. Those in red are located in the main heritage cluster areas.

Figure 47: Liverpool Visitor "Experiences" plotted on Place Making Mosaic



This shows quite clearly that:

- Experiences that are "independent" are best nurtured in conservation areas/areas with strong heritage character. The case studies in this report on the Northern Quarter of Manchester and the Hope Street areas of Liverpool demonstrate that they sustain a very wide range of activity, most of it of an "independent" orientation. There are a number of reasons for this. Firstly, the nature of the property often makes it difficult for national multiples to replicate their "standard" formulas in conservation areas. To do so, they have to work with listed buildings, with shops that are small and difficult to expand. This gives independents, who can work in those conditions, the opportunity. Secondly, conservation areas have a "grain" that is conducive to a more "leisurely" and distinctive ambience which people look for when they are in a more relaxed mood.
- If a city like Liverpool did not make the most of its conservation areas, it would have little or no offer that is to the right hand side of the framework. As a result, it would be one-dimensional and not have the balanced offer that can appeal to a wide range

> of people. This is, in a nutshell, the core problem for many of the large towns in the North West, as demonstrated in the image chart in Figure 41. They are not seen as being distinctive because, as yet, they have not been able to nurture distinctive and attractive experiences within character areas. In consequence, they are seen as one dimensional and find it difficult to distinguish themselves from other places.

Possibly every city or large town in the North West could make much more of its heritage clusters. Many have started to so – Stockport, assessed in another case study in this report, is a good example.

The best UK examples of zonal development and management are in London and are private sector led.

The Howard de Walden Estate in Marylebone is an exemplar. Under the visionary leadership of a new chief executive, it set about changing the character of the area. A previously undistinguished high street was transformed into one of the most "cosmopolitan" shopping areas in London. It was branded "Marylebone Village" and a farmers market and a range of small specialist food shops were enticed to open in order to create a village feel. Waitrose and a Conran Shop/Restaurant were also enticed to take units, creating anchor attractors. The entire street is now lined with fashion and design oriented stores, most of which are not seen in other parts of London. It has a strong sense of place.

De Walden's work shows how it is possible to use certain basic principles – zonal development, branding and management, and anchors - to transform the sense of place in an area of a city, but it had the advantage of owning most of the property.

Perhaps more inspiring is the work of Shaftesbury plc, which did not have that advantage.

Figure 48: Case Study _ Shaftesbury plc



Shaftesbury plc started, in 1986, acquiring holdings in the West End "quarters" of Chinatown, Carnaby Street and Covent Garden.[14] *Their strategy is to buy property in areas where there are distinctive, emerging clusters, and to raise values by promoting and developing the clusters. They encourage new and unique businesses that are seen as too risky and unprofitable by traditional landlords. They develop a significant amount of residential in the mix, because of the return and because it generates a "village" atmosphere. Its anchor development in the Seven Dials area (north of Covent Garden) was the Thomas Neale shopping centre. That led to a cluster of youth fashion brands than now occupy most of the units in Neal Street (e.g. Diesel, O'Neil, Urban Outfitters). The rentals are higher than in the rest of Covent Garden because of the appeal of the area to high spending young people. They used a similar approach to regenerate Carnaby Street, where they bought a large number of properties in the 1990s. They invested in promotion and refurbishments, encouraged a better standard of occupier, and built an anchor development called Kingly Court, which is arranged on three floors around a central courtyard. Many of its 30 units are occupied by unique or flagship stores selling fashionable clothing and accessories. Most of the tenants on Carnaby Street itself and Newburgh Street are now fashion and health and beauty brands like Vans, American Apparel, and O'Neil. Although Shaftesbury work in areas of multiple ownership, they create brands, market them, provide visual indications that demarcate the areas and create sense of place, using service charges to do so. They ensure that even the Christmas lights are a good fit with the sense of place that they are trying to establish.*

Similar principles have been adopted with success in other parts of the UK such as the Cathedral Quarter in Derby and Hastings Old Town. The general principles are quite simple:

- **Focus on micro areas** – zones which have a distinctive character. This may be a part of town or a shopping mall. It might equally be a street, a block, or a part of a shopping mall.
- **Establish an appropriate partnership vehicle.** This might be a single developer, a development partnership, a partnership of property owners-tenants, or a business improvement district.
- Be clear as to the **type of experience** that is being created and the type of customer that is the primary target. The type of experience that is best suited to the zone is likely to depend on the *physical character* of the area and the *nature of the market conditions* in which it exists.

[14] In 2005 Shaftesbury's holdings in Covent Garden (mostly around the Seven Dials) were valued at £275 million, in Carnaby Street at £441 million and in Chinatown at £261 million.

- Give the zone a **name** and develop a **logo**.
- Put **signals as to the type of area** that this is – this might be in the form of signage, gateways (Chinese Arch principle), the nature of the public realm, or public art.

Figure 49: Creating a presence for an area

It is important that visual clues are provided to tell people what "quarter" they are in

- Develop one or more appropriate **anchors** that will attract the right type of person to the zone.
- Be **selective in accepting tenants**, aiming for only those who are "on message".
- Encourage **animation activity** that is of a style and nature that fits the vision for the area.
- For areas dominated by independents, create a **village** ambience.
- Find and encourage developers who have the **vision and ability** to deliver schemes that have a clear vision and make step changes to the quality of the destination offer.

3.7 Estimate of visitor spend that can be attributed to townscapes

There is, clearly, no scientifically accurate manner of ascertaining exactly what influence that heritage orientated townscapes might have on influencing the choices that people make as to where they visit. It clearly has some impact in every town and city across the region, but in relatively different degrees and there is no way of knowing for sure what that might be (not least because most people will be affected by it subconsciously).

In order, however, to make a crude estimate, we have taken the following approach, using data from the NW Day Visits Survey:

- Listed the number of visits that the survey attributed to all towns and cities in the region for categories of day trip that, the evidence outlined above suggests, are likely to be affected by the heritage of the destination. They are General Day Out, Leisure Activity, Special Shopping Trip, Have a Meal, and Attend a Special Event (it excludes visits to a tourist attraction because that has been counted separately when considering the impact of landmarks). The survey recorded about 84 million visits annually to towns and cities for these purposes.
- Made an estimate of the impact that the heritage might have in motivating trips. This has been estimated at: 65% Chester; 50% Southport, Lancaster and Carlisle and the "heritage towns"; 40% Liverpool; 35% Manchester; 20% resort towns; 15% all other towns and cities. This results in an average across all towns and cities of 30%.

This results in an estimate of about 30 million day visits that can be attributed to heritage townscapes over and above those that entail visits to landmark attractions.

The NW Day Visitor Survey estimated an average spend per day out for these activities of about £25 per person. This implies annual expenditure of about £750 million per annum that can be attributed to the impact of heritage.

Figure 50: Day trips taken to destinations for purposes of "General Day Out", "Leisure Activity", "Special Shopping Trip", "Have a Meal", and "Attend a Special Event", with estimated proportion that can be attributed to the impact of heritage

	Visits	*% Attributable to heritage*	*Visits Attibutable to heritage*		*Visits*	*% Attributable to heritage*	*Visits Attibutable to heritage*
LARGE CITY				RESORT TOWNS			
Manchester & Salford	9,492,379	35%	3,322,332	Blackpool	3,612,958	20%	722,592
Liverpool	3,394,589	40%	1,357,836	Cleveleys	57,587	20%	11,517
HERITAGE INTENSIVE				Fleetwood	823,046	20%	164,609
Chester	4,848,486	65%	3,151,516	Grange-over-Sands	803,810	20%	160,762
Carlisle	1,655,364	50%	827,682	Hoylake	108,401	20%	21,680
Lancaster	802,367	50%	401,184	Keswick	2,209,281	20%	441,856
Southport	2,280,731	50%	1,140,365	Lytham-St Annes	886,253	20%	177,251
LARGE POWERHOUSE				Morecambe	1,206,000	20%	241,200
Accrington	73,992	15%	11,099	West Kirby	515,394	20%	103,079
Barrow-in-Furness	182,306	15%	27,346	Windermere	5,733,600	20%	1,146,720
Birkenhead	695,608	15%	104,341	TOWNS			0
Blackburn	1,018,341	15%	152,751	Alsager	561,598	15%	84,240
Bolton	813,865	15%	122,080	Altrincham	756,244	15%	113,437
Burnley	944,556	15%	141,683	Bebington	650,787	15%	97,618
Bury	506,067	15%	75,910	Bootle	713,478	15%	107,022
Crewe	406,773	15%	61,016	Brampton	15,994	15%	2,399
Oldham	1,162,364	15%	174,355	Cheadle	415,954	15%	62,393
Preston	815,880	15%	122,382	Chorley	1,070,527	15%	160,579
Rochdale	601,964	15%	90,295	Congleton	178,380	15%	26,757
St Helens	854,672	15%	128,201	Crosby	58,782	15%	8,817
Stockport	724,314	15%	108,647	Formby	654,970	15%	98,245
Widnes	162,973	15%	24,446	Kirkby	1,658,044	15%	248,707
Wigan	187,191	15%	28,079	Leigh	555,747	15%	83,362
HERITAGE TOWNS				Leyland	1,096,594	15%	164,489
Appleby in Westmorland	995,104	50%	497,552	Maryport	491,356	15%	73,703
Ashton-under-Lyme	1,570,622	50%	785,311	Middleton	154,957	15%	23,244
Clitheroe	582,710	50%	291,355	Nelson	527,238	15%	79,086
Cockermouth	1,501,870	50%	750,935	Neston	1,276,008	15%	191,401
Ellesmere Port	611,842	50%	305,921	Northwich	1,643,001	15%	246,450
Garstang	934,388	50%	467,194	Poynton	1,272,178	15%	190,827
Kendal	274,685	50%	137,342	Prescot	58,819	15%	8,823
Kirkby Lonsdale	141,397	50%	70,699	Rawtenstall	2,119,472	15%	317,921
Kirkby Stephen	2,108,895	50%	1,054,447	Runcorn	373,960	15%	56,094
Knutsford	742,780	50%	371,390	Sale	288,813	15%	43,322
Macclesfield	2,848,333	50%	1,424,166	Skelmersdale	1,107,089	15%	166,063
Nantwich	253,281	50%	126,640	Wallasey	96,525	15%	14,479
Penrith	886,996	50%	443,498	Warrington	2,476,737	15%	371,511
Ravenglass	100,241	50%	50,120	Whitefield	72,148	15%	10,822
Ulverston	285,879	50%	142,939	Wilmslow	909,969	15%	136,495
Whitehaven	941,264	50%	470,632	Winsford	355,225	15%	53,284
				Workington	56,321	15%	8,448
				Total:	**84,028,314**	**30%**	**25,404,992**

Source: NW Day Visits Survey 2007.