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Courtney, Paul and Gaskell, Peter and Mills, Jane and Boase, Rosamund E and Cheese, Lizzi and Jones, Owain and Kubinakova, Katarina and Lewis, Nick and Urquhart, Julie (2008). *Scoping Study on the Socio-Economic Benefits of Heritage in the National Parks - Final Report for English Heritage and Cadw. Project Report. CCRI, University of Gloucestershire.*

Published by Countryside and Community Research Institute (CCRI), University of Gloucestershire, and available online at:

<http://www.ccri.ac.uk/?s=Scoping+Study+on+the+Socio-Economic+Benefits+of+Heritage+in+the+National+Parks+>

We recommend you cite the published (post-print) version.

The URL for the published version is

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Scoping Study on the Socio-Economic Benefits of Heritage in the National Parks

Final Report

Prepared for English Heritage and Cadw

by the:

Countryside and Community Research Institute (CCRI)

31st October 2008

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Executive Summary

The National Parks of England and Wales are internationally renowned for the quality of their cultural and natural assets, providing a wide range of benefits for the economy, tourism, recreation and environmental conservation. The heritage of National Parks, the conservation of which is a statutory purpose, is fundamental to their unique present-day character and central to the sense of identity of local communities. It is also a key factor encouraging inward investment and tourism. However, the socio-economic benefits of heritage have yet to be fully defined and there remain a number of major methodological challenges to enable the full range of heritage benefits to be measured and evaluated in ways that can usefully inform policy formulation and management practice.

This study was commissioned by English Heritage and Cadw to address this knowledge gap and in turn to provide Government and its agencies at all spatial levels with a research programme to enable the socio-economic benefits of heritage in the National Parks to be recognised, measured and evaluated in an academically sound and rigorous way. The aims of the study were to:

- 1) Define the heritage resource in the context of National Parks;
- 2) Identify and examine the knowledge and research base relating to the socio-economic benefits of heritage within National Parks;
- 3) Identify any gaps in the knowledge and research base and provide a programme of work to fill such gaps.

The research comprised an extensive scoping study involving a literature review combined with various forms of stakeholder consultation, including email and telephone surveys, face-to-face interviews and participatory workshops. The research programme was therefore a product of the existing evidence base, consultation with stakeholders at varying levels of governance and management and a gap analysis undertaken by the research team.

At the outset, five themes were agreed with English Heritage and Cadw which acted as a guide to the content and structure of the literature review. These were:

- Definitions and boundaries of heritage;
- Recognising the importance of the historic landscape component in National Parks;
- Public and social aspects of heritage;
- Economic valuations and approaches; and
- Heritage and tourism.

The literature review revealed a wealth of relevant publications to help guide and inform further research but uncovered comparatively little material relating specifically to the socio-economic benefits of heritage and even less on the benefits of heritage in National Parks. As such, a number of research gaps were identified, as

well as methodologies to help inform such gaps, which the research programme begins to address.

Findings from the stakeholder consultation revealed a great deal of interest in, and need for, establishing a programme of social and economic research for heritage in National Parks spanning all spatial levels. At the heart of this was the need to recognise the specific importance and value of the historic environment in National Parks, as distinct from the wider natural environment, and that heritage conservation deserves comparable parity of support to that of nature conservation in these areas. More specifically, stakeholders perceived a requirement to:

- ensure that heritage has a strong voice where it matters, for example in arguing that heritage helps underpin the economic well being of National Parks;
- raise the educational profile of cultural heritage as this can influence developments such as post-school training and public awareness of the need to fund heritage;
- provide training in skills to support the heritage fabric at appropriate prices;
- work with the heritage governance community and private construction sector at local, regional and national levels;
- introduce new means to interpret the historic environment and develop curatorial skills alongside heritage management and conservation skills;
- emphasise that the heritage in National Parks forms a significant part of the overall national stock of heritage assets;
- recognise the importance of cultural heritage alongside that of natural heritage.

Findings from three stakeholder workshops sought to identify the priorities for research on the socio-economic benefits of heritage in National Parks, with a strong evidence base seen as the bedrock for achieving many of the wider goals listed above. Central to these priorities was a need to improve the understanding of heritage across all stakeholder groups, comprehensively measure the economic impacts of heritage in and around National Parks, and begin a much needed programme of research to capture the social benefits of heritage in parks, including health and wellbeing and wider cultural influences on park residents and visitors.

In the final stage of the study, findings from the literature review and stakeholder consultation were used to design a research programme to address gaps in the existing knowledge base. The aim was to assemble a programme of policy relevant and timely research which would address the salient research gaps in an academically sound and methodologically rigorous way.

A total of 22 research projects (or groups of projects) are contained in the programme, structured around four themes: generic policy and management (4 projects), social (5), economic (8) and tourism (5). A selection of research projects considered by stakeholders and the research team to be of the highest priority is highlighted in the following table.

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Theme	Project	Project aim
Policy and management	Cultural mapping	To produce a cultural map of heritage values, importance and understanding across the range of National Park stakeholders including park managers, policy makers, farmers, residents and visitors
Policy and management	Institutional values	To review and evaluate existing institutional arrangements and identify best practice in National Parks with regard to heritage, including: knowledge exchange activities heritage and management; and delivery of heritage benefits
Social	Sense of place	To identify the contribution that heritage specifically makes to the creation of a sense of place and to local distinctiveness in National Park communities
Social	Health and well being	To explore the extent to which heritage in National Parks contributes to health and wellbeing
Social	Social Capital	To identify the extent to which heritage contributes to the development of social capital in local communities, and vice-versa, in National Parks
Social	Intrinsic values	To develop methods and tools to measure the intrinsic value (historical, social, symbolic, aesthetic and spiritual) of heritage assets in National Parks
Economic	Market Stall	To examine consumer willingness to pay for heritage conservation and management in National Parks
Economic	Historic Environmental Accounting	To construct an environmental accounting framework to help measure, support and influence the sustainable development of National Parks which explicitly integrates the historic with the natural environment
Economic	Rural Development	To identify the various heritage-related activities in National Parks and measure the contributions of heritage activities to rural development relative to other sectors
Economic	Instrumental values	To investigate the local economic impacts of various forms of heritage management and funding, including community-based heritage assets, within, and beyond, National Parks
Tourism	Heritage tourism multiplier	To develop a tool to allow measurement of the impacts of heritage-related tourism to the local economy
Tourism	Shadow values of heritage	To estimate the shadow values (economic outcomes of positive non-market values) of heritage-related tourism in National Parks
Tourism	Tourism management	To explore the contribution of heritage to tourism management in National Parks; and to establish networks through action research links between tourism agencies and National Park Authorities with regard to heritage

Relationships between projects were also considered in order to help stakeholders identify potential sub-programmes following general themes. The Cultural Mapping study is an important precursor to the majority of projects in the research programme, and as such it is recommended that this study be prioritised for future research and is carried out prior to any other projects.

1. Introduction and methods

The National Parks of England and Wales are nationally and internationally renowned for the quality of their cultural and natural assets, which together create some of our most cherished environments and landscapes. As well as being places to live and work, National Parks also provide a wide range of benefits for tourism, recreation and nature conservation. Of equal importance is the heritage of National Parks, which is fundamental to their unique present day character and central to the sense of identity of the communities living there. Heritage is also a key factor encouraging inward investment and tourism (English Heritage and the Countryside Agency, 2006).

However, despite its importance, the socio-economic benefits of heritage have yet to be fully defined and there remain a number of major methodological challenges to enable the full range of heritage benefits to be measured and evaluated in ways that can usefully inform policy formulation and management practice. This study was commissioned by English Heritage and Cadw to address this knowledge gap and in turn to provide Government and its agencies at all spatial levels with a research programme to enable the socio-economic benefits of heritage in the National Parks, and indeed other designated and wider rural areas, to be recognised, measured and evaluated in an academically sound and rigorous way.

This report contains a synthesis of an extensive Scoping Study involving a comprehensive literature review combined with various forms of stakeholder consultation, including email and telephone surveys, face-to-face interviews and participatory workshops. The research programme presented in Section 4 of this report is therefore a product of the existing evidence base, consultation with stakeholders at varying levels of governance and management and a gap analysis undertaken by the research team.

The report is accompanied by a Technical Annexe containing a complete version of the literature review which provides a greater depth of information, understanding and appreciation of the material which is covered in Section 2. Nevertheless, the report has been written as a stand-alone document and reference to the full literature review may only be required for specific areas of interest.

1.1 Aims and objectives

The aims of the Scoping Study were to:

- 1) Define the heritage resource in the context of National Parks;
- 2) Identify and examine the knowledge and research base relating to the socio-economic benefits of heritage within National Parks;
- 3) Identify any gaps in the knowledge and research base and provide a research programme of work to fill such gaps.

To achieve these aims the Scoping Study had the following objectives:

- 1) To identify literature which builds on the Public Value model for the historic environment, looking at the inherent, instrumental and institutional value of the cultural heritage in National Parks;
- 2) To identify relevant work to date, in progress or being planned with respect to - or relevant to - National Parks;
- 3) To recognise the importance of the historic landscape component;
- 4) To examine the value of conserved landscapes to the general public, and to the wider economy;
- 5) To examine the value of heritage to tourism;
- 6) To review the literature pertaining to a number of relevant areas, including: economics, tourism, public benefits, landscape and the historic environment;
- 7) To identify a number of lines of future research which will facilitate a consideration of priorities, identify a potential programme of future work and provide the basis for engaging partners;
- 8) To consult relevant stakeholders on required research relating to the socio-economic benefits of heritage in National Parks using established participatory techniques.

1.2 Research methods

To achieve the above objectives, the study involved three stages and four associated work packages. The three stages comprised the following:

Stage 1: Literature review.

The literature search encompassed four main types of publication: policy documents, academic journal articles, specialist research reports and book chapters. Within each the review aimed to draw out:

- Policy guidance and statements;
- Theories and concepts;
- Methods and findings.

Following discussions with English Heritage and Cadw, five themes were agreed which acted as a guide to the content and structure of the literature review. These were:

- Definitions and boundaries of heritage;
- Recognising the importance of the historic landscape component in National Parks;
- Public and social aspects of heritage;
- Economic valuations and approaches; and
- Heritage and tourism.

A synthesis of all the themes is contained in Section 2. The full version of the literature review is contained in the Technical Annexe accompanying this report.

A central objective of the review was to consider the socio-economic benefits of heritage politically, conceptually, empirically and methodologically. The ultimate aim was to identify both the gaps in knowledge and the methodologies that could be utilised to address such gaps, which in turn would feed into the research programme presented in Section 4 of this report.

To ensure that the salient research gaps would be addressed in an academically sound and methodologically rigorous way, the review employed a high degree of critique, analysis and synthesis, with over 300 publications referenced.

Stage 2: Stakeholder consultation.

This formed an integral part of the study with four elements of stakeholder consultation used to explore the main issues surrounding the socio-economic benefits of heritage in National Parks and to help identify research gaps and priorities. The four types of stakeholder consultation employed in the study were:

- E-mail survey;
- Telephone interviews;
- Participatory workshops;
- Face-to-face interviews.

Email Survey

An email survey was sent out to 114 stakeholders at an early stage in the study; it was accompanied by a one-page project briefing in order to help gain publicity for the study at an early stage. The majority of stakeholders were suggested by the project Steering Group, and, in consultation with them, were classified into the following categories: 'Governance' 'Management' or 'Consumption'. The aim of the email survey was to gather views and suggestions about a variety of matters and issues relating to the socio-economic benefits of heritage in National Parks from up to 50 local, regional and national stakeholders; and gather references and publications which otherwise might be missed by the research team (especially from the grey literature).

As well as a request for any relevant literature, the survey aimed to explore stakeholder knowledge and perceptions around the following:

- Key elements of heritage associated with National Parks
- Main challenges faced by policy makers with respect to heritage in National Parks over the next 20 years
- Key issues for the historic environment in National Parks over the next 20 years
- Socio-economic benefits of heritage in National Parks
- Research agendas envisaged to be important and useful in this area over the next five years

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An overall response rate of 48% was achieved, yielding 55 useable responses for scrutiny by the research team. A breakdown of the survey responses is given in Table 1.1, which shows a good spread of responses according to both stakeholder category and region.

Table 1.1 Breakdown of responses to the email survey by region and stakeholder category

	England	E & W	Wales	All
Sent				
Governance	18	2	19	39
Consumption	7	9	16	32
Management	2	12	17	31
Un-classified	11	0	1	12
Total	38	23	53	114
Responded				
Governance	12	0	10	22
Consumption	2	4	7	13
Management	0	7	5	12
Un-classified	7	0	1	8
Total	21	11	23	55
Response rate (%)	55%	48%	44%	48%

Telephone Interviews

Telephone interviews were carried out with twelve of the stakeholders identified in the email survey to follow up on specific issues and add depth of analysis on such issues to feed into the literature review and preparation for the participatory workshops. In accordance with this, the telephone interviews aimed to both broaden and deepen the knowledge base being gained from stakeholders in the study. Telephone interviews lasted around an hour and were written up into a common template using detailed notes taken by the interviewer.

Of the twelve stakeholders interviewed, eight were drawn from the sample which did not respond to the email survey, and were asked generic questions designed to add breadth and depth to the responses from the email survey. The generic questions mirrored some of those used in the email survey but with additional questions around:

- The socio-economic benefits that should be prioritised/recognised by policy makers or park managers
- How the heritage of National Parks is perceived by: a) residents; and b) visitors of the parks
- Whether cultural heritage is perceived to be more evident or distinctive in National Parks compared to other areas

A further four stakeholders who did respond to the email survey were identified and asked more targeted questions to follow up on issues raised by them in the email survey. These issues included: heritage and young and socially excluded people; heritage and health; community involvement and partnerships in heritage; heritage and planning; heritage and community cohesion and heritage and market failure.

Participatory workshops

The primary aim of the workshops was to identify research gaps and priorities to feed into the design of the research programme presented in Section 4. Following completion of the literature review, email survey and telephone interviews, three participatory workshops (one in Birmingham covering the south of England, one in York covering the north of England and one in Cardiff covering Wales) were carried out with a sample of the stakeholders targeted during the email survey.

Invitations were sent out to 120 stakeholders, including representatives from all of the National Park Authorities (NPAs). Based on geographical and organisational relevance, 44 individuals were given the option of attending any one of the three workshops; 16 were invited to attend either one of the English workshops (Birmingham or York); and 60 were invited to attend specific workshops.

The target number of participants for each workshop was 16 and in the event total numbers of attendees at each workshop were: Birmingham (11), York (16) and Cardiff (33). Each workshop was run from 10.30 to 15.00, with two-thirds of the time devoted to participatory exercises. Following an introductory presentation by the research team, which included findings from the literature review and an explanation of the definition of heritage being employed in the study, iterative techniques were used at each workshop to generate cross-grouping consensus on research priorities using the 'pairing', 'quadrupling', 'octupling' approach. At each level of discussion, stakeholders were encouraged to reach a new consensus on the top 10 research priorities relating to the socio-economic benefits of heritage in National Parks. Each pair, four, and eight were issued with clear guidelines to ensure that the process created collective priorities rather than vested interest 'rent-seeking' behaviour, which is a serious danger where individual stakeholders assert their research needs without taking those of others into account.

Following an introductory presentation by the research team, participants were asked to discuss their perceptions of research gaps and priorities relating to heritage in National Parks first in pairs, after which pairs were joined to form groups of four. Finally, the fours were joined to make two groups of eight. Participants were requested to provide opinions from both their personal perspectives and their institutional backgrounds. At each stage, participants were asked to form a new consensus on the salient priorities relating to the socio-economic benefits of heritage in National Parks. This consensus was conveyed through feedback sessions, whereby one member of each group was asked to briefly relay to everyone their 'top three' research priorities out of their list of ten. Finally, two lists of 10 priorities were presented and discussed in the final feedback session, and this formed the main

output of each workshop for further analysis and consideration by the research team. Findings from the three participatory workshops are presented in Section 3.3.2.

Face-to-face interviews

Nine face-to-face interviews were carried out with a sample of stakeholders identified at the three workshops in order to gather more detail on issues relating to the socio-economic benefits of heritage in National Parks, and the research requirements across various disciplines and at differing spatial scales. Stakeholders were selected on the basis of their in-depth knowledge or interest in the topic and included senior managers involved in heritage, historic environment and conservation management in National Parks and other agencies, as well as other public officials involved in archaeology, agriculture and economic development.

To help achieve the stated objectives of the study and add value to the material gathered from the literature review and other forms of stakeholder consultation, it was agreed with the Steering Group that the interview schedule would be based around the Public Value Approach (PVA). This is an analytical framework that can be used to look at how public sector organisations operate and is described further in Section 2.2.1 of this report. Interviews were used to investigate how the three types of value recognised by the PVA (Intrinsic, Instrumental and Institutional) can produce socio-economic benefits within National Parks. Central themes for questioning were:

1. How do the interviewees view the value(s) of heritage within National Parks?
2. How do interviewees identify with the three sets of values of the PVA, and how do these aspects manifest themselves in heritage policy and their work?
3. For each set of values (intrinsic, instrumental and institutional, see section 2.2.1 for a fuller discussion) how can the socio-economic benefits be maximised. What needs to be done to achieve this?
4. What recommendations would interviewees make with respect to applying the PVA in heritage management and policy in the future?
5. Are there any areas where further research is required to inform policy and practice?

All interviews lasted around 45 minutes to 1 hour and employed a semi-structured interview schedule based around the above research themes but allowing plenty of scope for interviewees to speak about issues/areas that are important to them. It was not expected that every interviewee should be equally informed on each of the question themes and thus the interviewer remained flexible as to the most effective direction for questioning. Interviews were not recorded but were subjected to a form of content analysis, with each written up into a common 'template' designed to extract indicative narrative and salient findings.

A synthesis of the findings from the email survey, telephone interviews and face-to-face interviews is given in sections 3.1 and 3.2.

Stage 3: Gap analysis, development of a research programme and production of the project report

In the final stage of the study, findings from the literature review and stakeholder consultation were used to design a research programme to fill any gaps in the knowledge base. The aim was to assemble a programme of policy relevant and timely research which would address the salient research gaps in an academically sound and methodologically rigorous way.

The gap analysis first involved a synthesis of the salient gaps in research arising from the various sections of the literature review. These summaries can be found in three sections: 2.2.5, 2.3.4 and 2.4.5. The next stage involved examining the gaps revealed by the literature in the context of the research priorities expressed by the stakeholders in the participatory workshops (See section 3.3.2). Results from this iterative analysis fed directly into the research programme, which was structured around four main themes: cross-cutting, economic, public and social and tourism. This being set out in Section 4.

2. Literature Review

The literature review followed the structure outlined in Section 1.2, beginning with an electronic search of keywords under each of the headings, and informed by the email survey of stakeholders at an early stage. In conducting the literature review an appropriate balance had to be struck between capturing work that was directly relevant and indirectly or potentially relevant to the case of social-economic benefits of heritage in National Parks. The aim throughout was to draw out conceptual, methodological and empirical literature which would help inform, through an analysis of the identified gaps, development of a research programme. The reduced version that follows is aimed at highlighting the salient literature and deficiencies in the existing knowledge base to help inform the gap analysis. The full version of the literature can be found in the accompanying Technical Annex.

2.1 Heritage and National Parks: The context

This section aims to provide some important context to the socio-economic benefits of heritage in National Parks. It first describes the definition of heritage used for the purposes of the study and places this definition within the boundaries of the broader academic and policy context in England and Wales. The discussion then goes on to provide an overview of the significance of heritage in National Parks before considering briefly the extent to which heritage is recognised in National Park policy and planning.

2.1.1 Defining heritage

According to Baram and Rowen (2004), heritage is a complex notion involving a contemporary social understanding of places, combined with an active construction of the past. It has been conceptualised as a version of the past that belongs to a particular group at a particular time and place, and therefore can be subject to many different interpretations. There is an active debate on the meaning and nature of heritage drawing contributions from many disciplines and viewpoints including archaeology, architecture, history, geography, anthropology, museology, sociology, cultural studies, performance studies and tourism studies¹ (Peckham, 2003; Smith, 2006a).

While heritage policy and practice in the United Kingdom (UK) has traditionally focused on the regulation and management of material objects and places, in recent years far greater attention has been given to the notion of heritage as a social and cultural process rather than simply being about material 'things' (Smith, 2006b). This is reflected in a broader conceptualisation of place whereby:

The term 'place' goes beyond physical form, to involve all the characteristics that can contribute to a 'sense of place'. It embraces the

¹ Much of the key literature informing this debate has been drawn together in a four-volume collection of papers edited by Smith (2006a).

idea that places, of any size from a bollard to a building, an historic area, a town, or a region, need to be understood and managed at different levels for different purposes; and that a particular geographical location can form part of several overlapping 'places' defined by different characteristics. (English Heritage 2008)

According to Graham (2002) heritage can be viewed as knowledge, rather than an artefact, and is concerned with the ways in which very selective material artefacts, mythologies, memories and traditions become resources for the present. In this case heritage is 'conceptualised as the meanings attached in the present to the past and is regarded as a knowledge defined within social, political and cultural contexts.' This argument has been developed by Smith (2006a) who states that objects and places have no innate value as heritage, as all values are socially constructed.

If we accept that 'heritage' represents, and is an expression of, the cultural value of a society, and that these values are not inherent in a heritage item or event, it then follows that it is these values that identify and make certain sites, places or events heritage, not the other way round. There is no innate value in a heritage item – rather each item, place or event is made meaningful because of the role it plays as 'heritage' in fostering the expression, negotiation and performance of a range of cultural and social identities. All heritage is intangible, and may usefully be viewed as a cultural process of meaning and value production' (Smith, 2006a)

For Smith (2006a), '*heritage is a cultural process or performance that is concerned with the production and negotiation of cultural identity, individual and collective memory, and social and cultural values.*'

This view of heritage as a process recognises that heritage is not static and that it is mutable and subject to change. It also recognises that different individuals, groups and communities may construct heritage values in different ways for different purposes. While this study is concerned with the socio-economic benefits which are derived from heritage in National Parks it should be noted that conflict, or dissonance, can also arise from different constructions of heritage and that the identification, regulation, use and management of heritage by one group can affect the cultural, social, economic and environmental well-being of other groups. Linked to this is a debate about heritage and power and the role of expert and lay knowledge in the identification, regulation, use and management of heritage (McCrone et al, 1995; Ashworth and Tunbridge, 1996; Lowenthal, 1998; Graham et al, 2000; Baram and Rowen, 2004; Ashworth and Graham, 2005; Stanton, 2005; Clark, 2006; Smith, 2006b). What this debate shows is that heritage is in effect a difficult notion to 'pin down' and that there are many different views on how heritage should be defined, how it is used and what it includes. For this study we have adopted a broad definition of heritage and reviewed a wide cross section of

literature on the socio-economic benefits of heritage. It must however be born in mind that within this literature there are many different definitions of heritage.

Since the mid 1990s Government and its agencies in England and Wales have been involved in an active debate on the relationship between heritage, sustainability, economic regeneration, social inclusion, identification with place and the part heritage can play in building sustainable communities (Newman and Mclean, 1998, Strange and Whitney, 2003; Gard'ner, 2004; Pendlebury et al, 2004; Selman, 2004; Stubbs, 2004). In the last decade there has been a significant growth in the number of discussion, policy and advisory documents in these areas. (see Cadw, 2003a; DCMS and DTLR, 2001; DCMS, 2002 & 2004; English Heritage, 1997, 1999, 2000a & b, 2004a, 2005, 2006c, 2008; English Heritage and Countryside Agency, 2006).

According to Hudson and James (2007) such publications are evidence that three major changes have taken place in recent years to the policy framework for the conservation of what they term the 'historic environment'. First, there has been the development of holistic landscape-based approaches to conservation. Second, there has been a widening of heritage values to include those of particular groups and communities as well as those based on academic disciplines. Third, there has been a shift from control-based approaches to conservation towards those based on the dynamic management of change. At an agency level these changes can be clearly seen in the six conservation principles developed by English Heritage for the management of the historic environment (see English Heritage, 2008). These principles are that:

- The historic environment is a shared resource;
- Everyone should be able to participate in sustaining the historic environment;
- Understanding the heritage value of places is vital;
- Significant places should be managed to sustain their values;
- Decisions about change must be reasonable, transparent and consistent;
- Documenting and learning from decisions is essential.

The move to conservation approaches based on the active management of change can also be seen in English Heritage's promotion of informed and constructive conservation:

English Heritage promotes Constructive Conservation. Our approach to heritage protection is flexible, well-informed and based on helping others to understand and value the continuing development of historic places. Historic places are there to be used. Part of what makes them so interesting is a robustness that reflects sometimes centuries of use. Adapting them can provide a good return and the unique character of such places carries a premium. (English Heritage, 2006c).

2.1.2 A definition of heritage

For the purpose of this study we have adopted a definition of heritage based on one used by English Heritage (see English Heritage, 2008, p71). This is a definition that is familiar to many policy makers and practitioners:

Heritage: *All inherited resources, which people value for reasons beyond mere utility.*

Heritage, cultural: *Inherited assets which people identify and value as a reflection and expression of their evolving knowledge, beliefs and traditions, and of their understanding of the beliefs and traditions of others.*

Heritage, natural: *Inherited habitats, species, ecosystems, geology and landforms, including those in and under water, to which people attach value.*

The definition used here is deliberately couched in broad terms in order to be as inclusive as possible and encompass a wide range of heritage qualities. It should be noted that the heritage 'resources' are not specified apart from two broad categories of cultural and natural heritage (see ICOMOS and ICTC, 2002). While it is recognised that boundaries between these categories may be blurred, they reflect the particular legislative framework that has developed around heritage management in the UK. This broad approach taken to defining heritage encompasses notions of the historic environment and historic landscape, which represent both cultural and natural heritage:

The historic environment is all the physical evidence for past human activity, and its associations, that people can see, understand and feel in the present world:

- *It is the habitat that the human race has created through conflict and cooperation over thousands of years, the product of human interaction with nature*
- *It is all around us as part of everyday experience and life, and it is therefore dynamic and continually subject to change*

At one level, it is made up entirely of places such as towns or villages, coast or hills, and things such as buildings, buried sites and deposits, fields and hedges; at another level it is something we inhabit, both physically and imaginatively. It is many-faceted, relying on an engagement with physical remains but also on emotional and aesthetic responses and on the power of memory, history and association. (English Heritage, 2000a)

The historic environment includes:

“All aspects of the environment resulting from the interaction between people and places through time, including all surviving physical remains of past human activity, whether visible or buried, and deliberately planted or managed flora.” (English Heritage, 2008)

For the purpose of this study the definition of landscape used in the European Landscape Convention (Council of Europe, 2000) is adopted:

Landscape means an area, as perceived by people, whose character is the result of the action and interaction of natural and/or human factors.
(Council of Europe, 2000)

The definition of heritage used in this study recognises that heritage resources can be tangible and intangible (see Ahmad, 2006) where intangible heritage is:

The practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artefacts and cultural spaces associated therewith- that communities, groups and, in some cases, individuals recognise as part of their cultural heritage. This intangible heritage, transmitted from generation to generation, is constantly recreated by communities and groups in response to their environment, their interactions with nature and their history, and provides them with a sense of identity and continuity, thus promoting respect for cultural diversity and human creativity (UNESCO, 2003)

2.1.3 Heritage and National Parks

It is now increasingly recognised that all places, at whatever scale, from individual sites through designated areas such as National Parks to whole regions, have a range of associated cultural and natural heritage values and that the sum of these values will determine the significance of a place and inform its regulation and management (English Heritage 2008). English Heritage (2008) has identified a range of heritage values, arranged in four groups, which are considered important in determining the significance of any place. These are:

- Evidential value: the potential of a place to yield primary evidence about past human activity;
- Historical value: the ways in which the present can be connected through a place to past people, events and aspects of life;
- Aesthetic value: the ways in which people derive sensory and intellectual stimulation from a place;

- Communal value: the meanings of a place for the people who relate to it, and whose collective experience or memory it holds.

The four groups of heritage value are considered to be 'intrinsic' to a place and are distinct from the 'instrumental' heritage values, which generate social and economic benefits for places.

The range and depth of cultural and natural heritage values attributed to a particular place may vary between different groups and communities and also vary over time. This means that the significance of places may also vary between different groups and communities and over time. This can be seen in a change in approach to the development of policies for National Parks which has broadened, over time, from a natural heritage focus, based around such concepts as natural beauty and relative wilderness and a perceived lack of human intervention, to one which also recognises the importance of cultural heritage.

Since the 1980s there has been a growing recognition of the importance and significance of cultural heritage within the National Park system. This was marked by an increase in heritage expertise, particularly archaeology and landscape architecture, within National Park Authorities (NPAs). From a legislative perspective the cultural heritage of National Parks was formally recognised by the 1995 Environment Act, which made the conservation and enhancement of cultural heritage a primary aim (Arnold, 2006). The 1995 Act states that the two statutory purposes of the National Parks are:

- To conserve and enhance the natural, beauty, wildlife and cultural heritage; and
- To promote opportunities for the understanding and enjoyment of the special qualities of the National Parks by the public.

According to Defra (2008), if there is conflict between the two aims then conservation must take priority. In drawing attention to the provisions of the act, the Department of the Environment (1996) described the National Parks as areas of exceptional natural beauty which contain important species and habitats. However, it also emphasised the importance of the tangible and intangible aspects of cultural heritage:

... the Parks are also living and working landscapes and over the centuries their natural beauty has been moulded by the influence of human activity. Their character is reflected in local traditions which have influenced farming and other land management practices. It is also reflected in the local building materials and vernacular style, monuments and landscapes, often of archaeological or historical significance, and in the words, music, customs, crafts and art which mark the individual characteristics of each Park. The Parks represent an important contribution to the cultural heritage of the nation.” (DoE, 1996, pp 2-3)

One of the most distinguishing features of National Parks is that their heritage value is often expressed across the landscape rather than being confined to individual sites. As well as being protected areas National Parks are also protected landscapes and are recognised as Category V protected landscapes/seascapes under the International Union for Conservation of Nature (IUCN) classification because of their cultural significance (Phillips, 2002). Category V landscapes/seascapes are defined as an:

Area of land, with coast and sea as appropriate, where the interaction of people and nature over time has produced an area of distinct character with significant aesthetic, ecological and/or cultural value, and often with high biological diversity. Safeguarding the integrity of this traditional interaction is vital to the protection, maintenance and evolution of such an area. (IUCN, 1994)

This theme is developed by English Heritage and the Countryside Agency (2006) who stress the importance of recognising National Parks as cultural landscapes:

England's National Parks are amongst its finest and most treasured landscapes. They include many areas prized for their remoteness, tranquillity and their importance for nature conservation. But, despite their apparent wildness, the landscapes we see today are cultural landscapes – the result of thousands of years of human interaction with nature. They continue to be living and working landscapes and the people who manage the land today help safeguard their special qualities. The heritage of each National Park is fundamental to its unique present-day character. It exerts a powerful influence on modern land use within the Parks, on their patterns of woodland, wetland, common land and fields and on the character of their villages and towns. This heritage is central to the sense of identity of the communities living in the Parks and a key factor encouraging inward investment and tourism. (English Heritage and Countryside Agency, 2006, p1).

The importance of the cultural landscape within National Parks is also clearly recognised in Wales:

Unlike the wilderness parks in some other countries, the National Parks of Wales are cultural landscapes, moulded by human influence over millennia. Most of the Parks' area is under private ownership and their landscapes are the product of human intervention with natural processes. (CCW, 2007)

In addition to the Environment Act, another important development also took place in 1995 when the historic environment partnership between the statutory heritage and countryside agencies of England and Wales and the National Parks was formalised by a joint statement on the Historic Environment in the National Parks in

England and Wales. This statement, which was revised in 2004, recognises the fundamental contribution of the historic environment to the character of National Parks and acknowledged a range of opportunities provided by the Parks for the conservation of the historic environment, the promotion of public understanding of heritage and the sharing of best practice (English Heritage and Countryside Agency, 2006).

2.1.4 Recognising the importance of the historic landscape component

Understanding of the contribution of human activity to the landscape's character and appearance has been assisted by the development of Historic Landscape Characterisation (HLC) (Fairclough, 2001) and most National Park Authorities now have access, or will have access in the near future, to historic landscape characterisations to inform their policy making and management practice.

HLC is a type of landscape archaeology that attempts to represent and understand landscapes with particular reference to their historical development (McNab and Lambrick, 1999; Turner, 2006). The HLC approach, which has been developing since the early 1990s and is continuing to develop, provides a useful tool for providing an over-arching view of the whole historic landscape (Fairclough, 2007). HLC is a means of defining, mapping and recording the evidence of past human activity in the present landscape. It looks at the whole of the landscape and not just individual sites and recognised that landscape is ubiquitous (Turner, 2006). The HLC approach helps to tie down the way in which the physical remains of past human activities underpin the distinctiveness and diversity which is valued in present-day landscapes. It is a process that demonstrates that everywhere has a history (Cadw, 2003b, p11).

HLC was devised for many reasons but primarily because there were major gaps in archaeological resource management and in understanding the historic environment at a landscape scale (Aldred and Fairclough, 2003). Importantly the approach '*...allows historic landscape character an independent existence, to be studied and understood, managed, protected or enhanced, on its own terms*' (Fairclough, 2001). In this way the approach provides a distinct 'historic' view of landscape that may be less evident in other characterisation approaches. As Clark (2005) notes, HLC can provide an integrated way of working with the historic environment when aligned with other forms of assessment and characterisation. As such the value of the historic environment is not overlooked (see also Fairclough and Macinnes, 2003). The HLC approach also has a close association with the European Landscape Convention (ELC) being developed at the same time as the Convention and sharing similar philosophies about the character of landscape, its dynamism and the need to look toward future management (CoE, 2000; Turner, 2006).

The ability to raise the profile of the historic character of landscape is also important because the construction of heritage in relation to rural areas, particularly agricultural landscapes, has tended to focus on natural heritage components, leading to the marginalisation of cultural heritage in the debate. Last (2006) points to a

series of factors that have led to the prominence of natural heritage. These include the more tangible and quantifiable aspects of natural heritage, such as ecology, which are embedded in a tradition of scientific enquiry. The existence of quantitative data, often collected over many years, has facilitated the monitoring of change and the creation of indicators of change (Haines-Young et al, 2000; CQC, 2003). In contrast, the quantification of tangible cultural heritage is relatively undeveloped. This is, in part, due to the complex debate surrounding the values and significance of cultural heritage and also to its ubiquitous nature, which works against the creation of simple quantitative indicators.

2.1.5 Heritage recognition in National Park management, planning and policy

The increased emphasis on heritage and the historic environment is expressed within National Park Management Plans and related policy documents. Under the 1995 Environment Act NPAs are required to prepare and publish Management Plans and to review them on a quinquennial basis. The purpose of these plans is to set out the principles, vision, long-term aims and policies for management based on the National Park's special qualities (DoE, 1996; CCW, 2007). Although the language used in the Management Plans may vary it is clear that both tangible and intangible aspects of cultural and natural heritage are key contributors to the special qualities of National Parks as identified by the NPAs through stakeholder consultations. For example, cultural heritage, rich archaeology and historic buildings and diversity of landscape were among the key special qualities of the Pembrokeshire National Park identified by a survey of visitors and residents to inform the preparation of the draft 2008-2012 Management Plan (Pembrokeshire Coast NPA, 2008). Likewise in the Dartmoor National Park Management Plan (Dartmoor NPA, 2007) heritage featured strongly among its special qualities with reference being made to:

***Strong rural communities**, with their origins in farming adapted to their rugged environment, with a distinctive dialect and long established local traditions...*

***Traditional farming practices** extending back thousands of years, using moorland commons for extensive grazing of cattle, sheep and ponies... One of the **most important collections of archaeological landscapes** in Western Europe revealing a chronology of human activity stretching back over 8,000 years, from ancient field systems to the legacy of tin mining. A strong medieval settlement pattern of scattered farmsteads, hamlets, villages and towns set within enclosed farmland surrounding the open moor, linked by an intimate pattern of sunken lanes...*

*An **inspirational landscape** of legends and myths that has inspired art and literature through the centuries and continues to inspire, offering spiritual refreshment and opportunities for quiet reflection, escape, challenge and creativity. (Dartmoor NPA, 2007, p17)*

The concept of the cultural landscape is now firmly embedded in the policy process and provides the framework for policies formulated to manage different aspects of heritage within National Parks. This influence can be traced through the main policy realms that comprise management plans:

- Landscape, beauty;
- Cultural heritage, historic environment;
- Natural environment, biodiversity, nature conservation;
- Natural resources, land management, mineral extraction, climate change;
- People, communities, businesses;
- Understanding, education, interpretation, information;
- Access, recreation, tourism;
- Transport, travel;
- Sustainable development.

A number of NPAs have developed Historic Environment Strategies to increase awareness, knowledge and understanding of the historic environment and improve management of change (See for example Yorkshire Dales NPA 2002; Lake District NPA, 2007). The Yorkshire Dales National Park strategy adopts a broad definition of the historic environment, which recognises both its tangible and intangible character and follows the approach taken by English Heritage:

The historic environment of the Yorkshire Dales National Park is all the physical evidence for past human activity and its associations that can be seen, understood and felt. It embraces all those aspects of the area that reflect the shaping hand of human history and is the habitat that people have created through interaction with nature over thousands of years. It is all around us as part of everyday experience and life and is therefore dynamic and continually subject to change. (Yorkshire Dales NPA, 2002, p2)

More recently, National Parks have also begun to develop strategies for their cultural heritage, which interestingly may or may not be seen to encompass the 'historic environment'. The cultural heritage strategy for the Peak District covers both tangible and intangible aspects of heritage in that it includes:

... all the evidence of past human activity and the associations that can be seen, understood and felt. It includes landscapes, buildings, sites, monuments and objects, records, archives and collections, as well as local customs, legends, traditions and the arts. The cultural heritage includes the aesthetic appreciation as well as the physical evidence of human activity across the years. It is all around us providing the context for our everyday lives. It influences regional, local and cultural identity and makes a significant contribution to quality of life, including access, accessibility and social inclusion. It contributes to knowledge, education, understanding and the local and regional economy, it provides recreation

and employment, is a force for regeneration, tourism and sustainable development and provides places in which to live and work. (Peak District NPA, 2007, p4)

The purpose of these strategies is to add detail to the objectives of the Management Plan and to promote the inclusion of cultural heritage as a consideration across the range of initiatives with which NPAs are engaged. The main objective of these strategies is to promote the sustainable management of cultural heritage within the parks and to identify the actions and partners required to achieve this.

The social, economic and environmental benefits of heritage are recognised by NPAs. For example the Brecon Beacons NPA (2005) aims to conserve cultural heritage by *'highlighting the contribution that historic landscapes, local distinctiveness and vernacular buildings make to the local economy and environment.'* The Yorkshire Dales NPA also recognizes the link between heritage and social, economic and environmental benefits:

The historic environment is an irreplaceable record that contributes to our understanding of the past and to our sense of national identity. It also sustains local distinctiveness, adds to quality of life and has immense importance and economic value for leisure and tourism. (Yorkshire Dales NPA, 2002, p2)

2.2 Public and social aspects of heritage

This section of the review considers the extent to which heritage can provide social benefits to individuals and communities within National Parks. It initially considers the concept of 'public value' and discusses the various ways of both identifying the heritage that is valued by the public, and measuring that value. The review also considers the use of heritage in social/community regeneration programmes in National Parks in terms of creating a sense of place, nurturing community identity and generating social cohesion. Consideration is also given to the social benefits brought about by participation in heritage provision, including the potential to develop social capital within communities in National Parks and the personal development of individuals.

2.2.1 Public Value of heritage

It is increasingly argued that the concept of public value provides a useful way of thinking about the goals and performance of public policy (Moore, 1995; Kelly et al, 2002), particularly in relation to the heritage sector (Kerr, 2000; Australia ICOMOS 2004, English Heritage, 2000a; Demos, 2004). At its most basic level, 'public value' is an analytical framework that can be used to look at how public sector organisations operate. It starts from the premise that such organisations are there to add or create value for the public, and that, therefore, the best way of measuring their success is to look at their policies in terms of what the public cares about (Clark, 2006).

It is widely reported that public value is in part a reaction to the application of what is known as the 'new public management' to public sector organisations in the 1980s and 1990s (Clark, 2006). Whilst some aspects of this approach have proved beneficial, there have also been disadvantages. New public management has tended to emphasise narrow ideas of cost-efficiency; they concentrated on quantified outputs, not qualitative outcomes, providing insufficient focus on citizens and their requirements and failing to balance outcomes with cost-effectiveness (National Trust & Accenture, 2006, Blaug et al, 2006). The approach has often led to the easily measurable outcomes becoming the objectives (Kelly et al, 2002; Holden, 2004). Public value provides a broader measure by covering outcomes, the means used to deliver them as well as trust and legitimacy. And in so doing it also addresses issues such as equity, ethos and accountability (Kelly et al, 2002).

Due to the subjectivity and contingency of heritage values it is often difficult to establish a clear nomenclature of values (Mason, 2002). Consequently numerous studies have created value typologies of heritage (National Geographic, 2006, Lipe, 1984; Australia ICOMOS, 1999; Frey, 1997; English Heritage, 2006a). Several studies have also attempted to categorise the value and benefits of heritage into more generic 'instrumental' and 'intrinsic' benefits (de la Torre et al, 2005). More recently some commentators (Holden, 2006) have added a third category, the 'institutional' value. These three values, as they relate to the heritage sector, are summarised below.

- *Intrinsic values*

Demos (2004) refers to intrinsic values as “those ascribed to a place or object that express an individual’s experience of heritage intellectually, emotionally and spiritually”. A further definition is provided by Impey (2006), who refers to intrinsic values as “evidential (people having access to the fact); historical (people connecting with the past); aesthetic (people visually responding to places); community (people associating themselves with places)”. Alternatively, Throsby (2006), in relation to what he terms cultural heritage, suggests assessing heritage in six constituent parts. These include aesthetic value, spiritual (or religious) value, social value (connection with others, a sense of identity), historical value (connection with the past), symbolic value (the extent that cultural objects act as “repositories and conveyors of meaning”), and authenticity value (“integrity and uniqueness”).

- *Instrumental values*

More simply, instrumental values are defined as those tangible benefits that arise from funding or conserving heritage. These might include, for example, educational, recreational, economic and social benefits (Demos, 2004; Impey, 2006). Recent work by Edwards et al (2005) and Courtney et al (2007) has examined the socio-economic benefits of farm building and walling schemes in National Parks, which are a good example of the instrumental values which can arise from grant funding.

- *Institutional values*

Institutional values consider the value of heritage organisations themselves and the extent of trust, legitimacy and confidence that they inspire (Clark, 2006). It relates to the processes and actions that cultural organisations adopt when they interact with the public. Finding out what the public wants and what aspects of heritage need to be investigated, protected or emphasized, is key to creating this institutional value (Demos, 2004). The role of experts within these institutions is to inform and empower the public through public engagement.

Methods of measuring public value

Methods of measuring the public value of heritage are still in the early stages of development. Some researchers (Throsby, 2006; Mason, 2005; 2002) suggest the need to create hybrid methodologies where both an economic evaluation and an assessment of cultural value effects are carried out in parallel. Others, such as Travers (2006), are concerned that a number of different methods of measuring ‘public value’ are evolving separately and there is a danger that each will be hard to compare with the others. There is a general feeling that a sector-wide methodology is required which would allow comparison of public values across heritage sites (National Trust and Accenture, 2006; Travers, 2006).

Mason (2002) provides a useful overview of issues, methodologies and tools applicable to value assessments. He suggests that a typology or nomenclature of heritage values is

required as a first step in the assessment. He recommends employing a toolbox approach, since a full assessment of heritage will require a diverse suite of methods and a flexible approach. Triangulation, which requires the use of quantitative and qualitative methods in complementary ways, should be at the core of the approach and will have to be adjusted as it is applied from project to project.

Measuring intrinsic values

Traditionally, intrinsic values have been estimated by experts, but there is increasing demand to find more rigorous ways of measuring such values (Holden, 2004). The following general tools suited to measuring intrinsic values are suggested by Mason (2002):

- Expert analysis (textual/iconographic/formal/semiological);
- Ethnography (surveys, interviews, oral histories, other participatory methods);
- Mapping – this constitutes a way of generating knowledge, which has proved more powerful with the introduction of GIS;
- Primary (archival) research and writing historical narratives;
- Secondary literature research – generates data relevant to a project quickly;
- Descriptive statistics – this might include content analysis of media coverage or interviews, demographic analysis and multivariate statistics.

Throsby (2001) also suggests five methods for determining the level of intrinsic value present in an object which comprise: contextual analysis; analysis of content; social survey methods; psychometric measurement; and expert appraisal. Similarly, National Trust and Accenture (2006) suggest that intrinsic values might be captured by an amalgamation of a series of judgements made up of experts, citizens and local communities. Whilst Holden (2004) proposes that the discourses from anthropology (discussion of historical, social, symbolic, aesthetic and spiritual values) environmentalism, intangible accounting and Public Value could be synthesised to provide a set of broad principles and useful tools for people working in the cultural sector.

Tweed et al (2002) have developed a survey technique that lays the groundwork for an assessment tool that National Park Authorities can use to help determine the intrinsic value of built heritage and facilitate greater public engagement (Sutherland et al., 2002). The survey methodology made use of photographs, including digitally altered versions, as well as maps, to be used *in situ* to test respondents' awareness of surroundings, to elicit perceived notions of quality and to communicate proposed changes to the area to assess respondents' attitude to changes within such historic environments. This could prove a useful technique to identify the intrinsic value of heritage in National Parks.

Instrumental values - Methods of public engagement

Effective public engagement is a key component of instrumental values. Engaging people requires an awareness of who needs to be reached, how they might best like to receive and comment upon information and contribute their knowledge, understanding

and skills, and how to feed back ideas or decisions that arise (Gathorne-Hardy, 2004). One technique used for public engagement is Citizens Juries. The Heritage Lottery Fund (HLF) with Opinion Leader Research ran a series of Citizen's Juries. Over two and a half days the jury of 16 local people visited and heard testimony from 5-6 HLF-funded projects. The aim was to discover why heritage matters (intrinsic values) and the benefits of heritage projects (instrumental values) (Forgan, 2006). This proved an effective method of public engagement in heritage decision-making which could be adopted by National Parks.

Another approach to measuring heritage instrumental values is provided by the Work Foundation Project (Blaug et al, 2006). The approach uses Public Value Performance Indicators to measure the capacity of an organisation to refine and respond to public preferences. In each case the number and quality of interactions are recorded.

Whilst the public value concept provides a useful framework for identifying and measuring the benefits of heritage, National Trust and Accenture (2006) suggest some limitations to the concept. The main concern is that the lack of quantification prohibits understanding and adequate consideration of cost efficiency. If National Parks wish to measure the cost-effectiveness of their heritage activities they may consider using the Public Service Value (PSV) model developed by National Trust and Accenture (2006). This model can help to target investments by focusing on a combination of benefit delivery to the citizen and the cost effectiveness with which it is delivered. It uses Performance Indicators which are weighted to provide an assessment of their relative importance in the organizations overall performance against its objectives. These indicators include inputs, such as 'total visitor numbers', but also economic impact and qualitative outputs, such as ratings given by visitors. One weakness of the model is that it does not provide a useful assessment of the intrinsic benefits of heritage. This would require a more holistic approach, including in-depth qualitative assessments and the use of other ethnographic research methods as outlined above.

The literature review has revealed an increasing interest in the use of the Public Value approach in assessing the heritage sector, although it is still in an early stage of development. Despite concerns about measuring cost effectiveness, the approach could usefully be adopted in National Parks to measure the socio-economic benefits of heritage. It provides an effective analytical framework for looking at a wide range of heritage benefits that go beyond the easily measurable economic outputs. As demonstrated in Section 2.2, development of methods for measuring instrumental values are more advanced than those for measuring intrinsic value. Intrinsic value needs to be articulated in a way that enables factors beyond the easily quantifiable to be accounted for.

2.2.2 Heritage and social regeneration

Social regeneration is a term that is increasingly being used when considering the social impacts of heritage (Evans and Shaw, 2004). It is argued that heritage can help to create social regeneration by creating sustainable communities, tackling social exclusion by

nurturing community identity and improving social capital (Flemming 1997; Evans and Shaw, 2004; National Trust, 2004; English Heritage, 2000b; DCMS, 2004).

Heritage buildings may be an important source of pride in a community's surroundings (National Trust, 2004); they may also lend character to an area and have deep-seated associations for local residents and communities (Heritage Link, 2002). Initiatives such as the Dolgellau Townscape Heritage Initiative in Snowdonia National Park and the Buckfastleigh Conservation Area Partnership, Ashburton Town in Dartmoor National Park, mean much more than restoring old buildings. They can also help to recreate the feeling of identity and a pride of place for individuals and the community (HLF, 2005a).

The economic regeneration benefits of heritage are well researched, but social regeneration is a new area of inquiry for the heritage sector and researchers are still working out what to measure and how to measure it. To date, it has received little attention in regeneration measurement criteria. Evans and Shaw (2004) suggest that the indicators of social regeneration are also the same as those widely used by Government in the context of neighbourhood renewal, social inclusion and community cohesion, including reduced levels of crime, increased health and well-being, increased educational attainment, reduced unemployment, greater community cohesion, greater environmental quality and quality of life (or livability). Thus there is considerable scope to adapt these indicators and principals of social regeneration to the heritage context within National Parks and to use these to ascertain the social benefits of National Park regeneration programmes.

Heritage and Sense of Place/Local distinctiveness

It is argued that a key contributor to social regeneration is the 'sense of place' or 'local distinctiveness' that is created by heritage (Evans and Shaw, 2004; DCMS, 2004; Stubbs 2004). Local distinctiveness in this context refers to characteristics that make it possible to recognise a place as 'somewhere in particular' (Gathorne-Hardy, 2004; Clifford & King, 1993). Places can be very powerful 'cultural tools' (Wertsch, 2002) which are used by people to affirm and reaffirm their individual and collective identities and helps bind communities together (Smith 2006a, b). This sense of place forms the basis of all other attachments, including the feeling of belonging. Demos (2004) suggest that heritage activities and the existence of heritage in a local community contributes to strengthened communities by creating a sense of connection to place through, for example, providing a spiritual connection and connecting the past and present.

The public increasingly recognise the social importance of the cultural heritage. The MORI poll for the British Government's 2000 review of heritage policies found that almost 90% of people value the cultural heritage for their sense of place and quality of life (English Heritage, 2000b). Lowenthal & Binney (1981) identified a sense of identity as a key motivational force behind the desire for preservation. Local distinctiveness and the heritage 'aesthetic' are also becoming increasingly important as more uniform landscapes are created through the impact of globalisation (Strange, 1999; Selman and Knight, 2006). The importance of local distinctiveness is

recognised by English Heritage who in 1997 gave weight to the conservation of locally valued distinctiveness as a key policy area as opposed to just historic asset (Stubbs, 2004). National Parks also pride themselves on their local distinctiveness. Increasingly, National Park management plans refer to actions to enhance or reinforce local distinctiveness. For example, in the following statement the Broads Plan (2004) recognises the importance to quality of life of actions that preserve local distinctiveness “Assessment of the character of this landscape is crucial for defining its distinctiveness and importance, locally, nationally and in the wider, European context. Decision-makers need to understand what gives the Broads its special character to ensure that development is of a high quality, which in turn improves people’s quality of life”. Also the Dartmoor National Park Management Plan (2007) recognises the importance of actions that maintain local distinctiveness stating that “In all work undertaken within the National Park an emphasis will be placed on quality, longevity, local distinctiveness, support for the local economy, and use of local materials wherever possible and appropriate”.

Cultural heritage

An important aspect of local distinctiveness is the associated cultural capital, which is about the identity of people and the places in which they live. The importance of cultural heritage is recognised by all National Parks in England and Wales. Since 1995, conservation and enhancement of cultural heritage in National Parks has been a statutory National Park purpose. Circular 12/96 (DoE, 1996) interprets cultural heritage broadly, to include not only the historic built and archaeological heritage, but also local traditions, local products and the words, music, customs, crafts and art which help to give a National Park its distinctive character. Such customs and traditions might include: traditions of land use and management, such as common land management; traditional skills, primarily related to agriculture, building with local materials, woodland management, boundary creation and repair and social traditions, markets and fairs (Dartmoor NPA, 2007). One indicator of cultural heritage used by the Brecon Beacons is the number of shows and events held within the Park (Brecon Beacons NPA, 2006).

Social cohesion and inclusion

While the literature on the role of heritage in ameliorating the effects of social exclusion is often urban focused, much of this is equally applicable to rural environments, such as those found in National Parks.

The historic environment community has long argued that heritage creates sustainable communities and can tackle social exclusion and contribute to social cohesion and inclusion (DCMS, 2004). This is achieved through heritage by nurturing community identity, helping people understand the past and future development of where they live, encouraging active citizenship, understanding the history of immigration and cultural diversity, combating crime and antisocial behaviour through developing pride of place, and creating both skilled and unskilled jobs through traditional crafts and activities involved with investigation and conservation (National Trust, 2004).

Contribution of heritage to social capital

There is also evidence of the potential for heritage and heritage institutions to contribute to development of social capital (Daly, 2005); although both research and findings from practice remain in the early stages of development.

The term social capital was originally coined by Bourdieu (1986) and further developed by Putnam (1995) to refer to social connections, and the attendant norms and trust and reciprocity also associated with these connections. According to the government's Performance and Innovation Unit (2002) 'social capital consists of the networks, norms, relationships values and informal sanctions that shape the quantity and cooperative quality of a society's social interactions... social capital can be measured using a range of indicators but the most commonly used measure is trust in other people'. Trust is a key ingredient, because without it other elements of social capital may not develop (CBS Network, 2002).

Social capital can result in, and be detected through, the quality and quantity of social interaction, shared objectives, cooperative action, reciprocity, civic engagement, and access to resources and opportunities. While social capital as viewed by Putnam is clearly beneficial, there is also the potential for social capital to have negative social impacts, for example conflicts within and between close-knit groups (Fukuyama, 1995), and the exclusion of some groups or individuals in community activities.

Methods for measuring social capital of heritage

The National Trust commissioned the Institute of Field Archaeologists (IFA) working with Atkins Heritage (National Trust, 2004) to test a suite of analytical methods that can measure where people are interacting well with the historic environment and where they are not, based on the concept of social capital. Techniques used included desk-based research, observational research and interviews.

The project identified a number of suitable indicators to measure the social contribution of the historic environment. These indicators aimed to identify variables, such as awareness of history of place/ historic environment; perceived value of history of place/historic environment; social capital; and health and crime. This was the first phase of the research and in order to improve the methodology the project recommended a number of areas for further research, including an in-depth exploration of the relationship between marking (presence of perception) heritage and measurable benefits, a long term testing of indicators; and exploration of need to adapt methods and indicators to rural or semirural rather than urban environment design.

The relationship between social capital and heritage itself represents a significant research agenda. Two central, and inter-related, research questions arise, which could usefully form the basis of a programme of research on heritage and social capital and heritage in National Parks. First, can heritage – including its conservation, recognition, management or mere existence - help to develop social capital in National Parks; and, in turn can that social capital help to preserve the heritage resource? This potentially self-

reinforcing cycle of processes represents an extremely rich area for research and one which in turn poses some important questions around the measurement of social capital. The potential symbiotic relationship between the development of social capital within local communities and the management of heritage initiatives and assets could be useful for park managers and policy makers seeking ways of engaging communities in heritage management and in fostering cohesion and co-operation in National Park communities.

One of the difficulties of measuring the impact of social capital is measuring trust and the distinction between cause and effect. Some authors conceive social capital (or at least “trust”) developing prior to community engagement (Etzioni, 1993; Fukuyama, 1995), whilst others see evidence for community engagement promoting social capital (e.g., Brehm & Rahn, 1997), whilst still others (see Putnam, 1995) posit a reciprocally causal relationship. Researchers do, however, tend to agree that the complexity of the process of regeneration makes it hard to attribute an effect to a cause, particularly in the short term. Another concern expressed by Daly (2005) is that the use of aggregate data in mapping trends in social capital in the cultural sector tells us more about the quantity of social capital than it does about the quality of social capital. Despite these concerns there is scope to further develop the indicators produced by the National Trust study, outlined above, and adapt them to the National Park context.

2.2.3 Heritage and health and well-being

While there is much evidence on the positive link between the natural environment and health and well-being (Newton, 2007), there is less evidence establishing a robust causal chain between heritage and wellbeing in terms of measurable impact. The most advanced area in terms of measuring the wellbeing impacts of heritage is to be found in studies of the health benefits of natural spaces, such as parks, green spaces and natural landscapes (Pretty et al 2005, Morris, 2003; Henwood, 2001; Bird, 2007; RMNO, 2004; Maller et al, 2002; Ulrich et al, 1991).

Many studies suggest that people use environmental resources for physical activity as part of their strategy for improving mental health and restoring themselves from the stresses of everyday lives (Mental Health Foundation, 2000; Mace et al, 1999). Stress reduction consistently emerges as the key perceived benefit of a wilderness experience, such as those found in National Parks (Knopf, 1987; Ulrich et al 1991). Viewing natural scenes is said to improve various dimensions of mental wellbeing such as mental alertness, attention, and better cognitive performance (Hartig, et al 1991; Tennessen and Cimprich, 1995). There is also substantial evidence demonstrating the positive impact that physical activity has on physical and mental wellbeing (Morris, 1994; Bird, 2007; Williams, 2006). This in turn has a number of substantial economic benefits, including reduced health costs (Wanless, 2002; DoH, 2004). Such arguments might be extrapolated to infer, for example, the benefits of funding for green spaces, or participation in archaeological digs in National Parks. However, Clark (2006) suggests there is a gap in research to identify, for example, a causal link between funding for a park and a saving on health costs.

Heritage may also benefit health indirectly by contributing to the development of social capital as some studies (Veenstra, 2001, Wilkinson, 1996) have shown the association between improved social capital and health. Several studies have also shown how green spaces in a range of forms (parks, allotments, etc) in urban areas encourage more social interaction and brings people together (Ward Thompson, 2002; Armstrong, 2000; Miligan et al, 2004; Kuo et al, 1998; Kuo & Sullivan, 2001b). However, others have argued that the evidence of social capital as a determinant of better health is still scant or ambiguous (Muntaner et al, 2000).

Wellbeing concepts and methods could also be used to value natural heritage in National Parks by focusing on people's experiences (Newton, 2007). They could be used in circumstances where it is not always appropriate to place a monetary value, such as the role that the natural heritage plays in meeting peoples' goals and aspirations. A range of techniques for analysing wellbeing have been developed by the Wellbeing in Developing Countries (WeD) research group (<http://www.welldev.org.uk/research/methods-toobox/toolbox-intro.htm>). These might include community profiles, resources and needs questionnaires; and Quality of Life interviews. Such techniques could enhance understanding of the interaction between the tangible and intangible goods that the historic environment in National Parks provides.

Participation in heritage provision

As well as heritage contributing to social regeneration, a variety of other social benefits can also be derived from participating in heritage activities in National Parks. This might include for example, participation in heritage projects, museum visits, or volunteering. Such benefits can accrue to both communities and individuals.

Community impacts

Heritage projects, such as the Local Heritage Initiative, funded by HLF, have brought diverse social benefits, beyond those achieved by other community projects (Countryside Agency, 2006). Such participation can deliver a sense of belonging, trust and civic engagement.

Applejuice Consultants (2006) undertook an evaluation of the social impact of Heritage Lottery Funded projects. Many of the projects reviewed had helped to provide a focus for the community. Projects had brought diverse groups and communities together, strengthening community cohesion through involvement in a variety of activities and events, including restoration of landmark buildings, the creation and conservation of community facilities and amenity space and events celebrating local history or cultural heritage. A number of projects had successfully targeted disadvantaged groups and communities for participation in heritage activities and there was evidence of projects contributing to social inclusion.

It is recognized by the Government that heritage activities can act as a key source of "opportunities for people from different social or economic backgrounds to come together to participate in activities and to enjoy new experiences" (DCMS, 2004, 31).

Evaluation of the Local Heritage Initiative found that social mixing was one outcome in the projects surveyed, particularly where long-term residents and newcomers were brought together. There is also evidence of intergenerational mixing, where older residents share memories with younger ones (Countryside Agency, 2006).

Other studies have considered the community impact of museums, including Coalter (2001) who suggests that they can make a substantial contribution to the growth of social capital (strengthening community networks/capacities) and personal capital (developing skills and confidence). Also Wavell et al (2002), found evidence of a wider social impact of museums, such as community empowerment, cohesion and capacity building and influencing disadvantaged and socially excluded groups. However, most of the evidence for this was anecdotal, indicating considerable potential for further research in this area. It is also suggested that museums build a sense of community identity (Bryson et al, 2002) and act as a kind of identity or cultural insurance (Wilkinson, 2006).

Whilst heritage activities can contribute to social inclusion there are others who argue that certain sectors of society are excluded from heritage provision. Matarasso (2000), for example, argues that heritage institutions, such as museums may actually unconsciously contribute to the exclusion of certain groups of people by reflecting the values, identity and interests of the majority at the expense of marginalizing difference, cultures or dissent. Further, volunteers in the heritage sector only represent a small sector of society (Holmes, 2002). A Mori poll (English Heritage, 2000b) found that many people believe that heritage provision in England does not adequately represent certain groups and 3 in 4 people believe that the contribution of Black and Asian people is not adequately represented. Some initiatives are trying to redress this balance, such as the Mosaic project (2001-2004) led by the Council for National Parks and Black Environment Network which aimed to create new opportunities for ethnic minority community groups to take part in conservation, educational, and outdoor leisure activities, thus increasing their understanding and enjoyment of the national parks. Further research is required to develop the work of the Mosaic Partnership to make heritage assets within National Parks relevant to ethnic minorities. This will require survey work to identify the social and cultural needs of ethnic minorities.

Roker and Richardson (2003), in a review of literature on conventional heritage demonstrate that young people (13-20), have a low level of engagement in heritage activities and sites as they find them uninteresting and irrelevant. In particular, young people from more disadvantaged backgrounds and young men are less likely to engage with traditional heritage activities. Due to a lack of information in both heritage and youth-work sectors on how to engage young people in heritage, the HLF has published guidance on involving young people (HLF, 2004). Like other rural areas of the UK, National Parks face the challenge of engaging young people in heritage activities by making them both interesting and relevant. Research is required to identify the needs of young people and to determine how these can be met. Roker and Richardson (2003) suggest a number of research areas, including developing an understanding of what young people see as their 'heritage' and

identifying what is it that encourages and discourages young people from getting actively involved in heritage activities.

Impacts on individuals

The strongest evidence of impact on individuals is found in 'personal development' (HLF, 2007). Wavell et al (2002), in relation to museums, archives and libraries, but which is also applicable to heritage sites in National Parks, found that they had an impact on individual personal development through the acquisition of skills, trying new experiences, confidence and self-esteem, changed or challenged attitudes, creativity, cultural awareness, communication and memory, and providing support for educational courses. This overlaps to some extent with education and learning considered in the next section.

Museums and other heritage sites also appear to help individuals become integrated into a community and have contributed to those newly arrived in the community as a resource to allow them to establish 'roots' (Wilkinson, 2006). According to Daly (2005), visiting a museum provides a means by which individuals can identify with particular groups or communities and thereby accumulate a stock of social capital. A similar point is made by Merriman (1991), who suggests that visiting heritage sites and museums is a way for people to acquire symbolic 'cultural capital' in order to demonstrate and affirm their social status and position within society.

Heritage can also contribute to the stock of social capital by providing opportunities for individual volunteering in National Parks. The heritage sector in National Parks is heavily dependent on the contribution made by volunteers. In 2005/6 England had an active volunteer workforce of some 476,000 individuals involved in heritage volunteering (English Heritage, 2006a). VisitBritain's annual *Survey of Visits to Visitor Attractions* suggests that about two-thirds of staff at historic visitor attractions were volunteers in 2006 (English Heritage, 2007b).

The Institute for Volunteering Research (IVR) found that various aspects of social exclusion were being addressed through volunteering, which was helping to combat feelings of personal isolation, empowering individuals, giving them the confidence and the skills to change their environment and themselves, enhancing people's sense of self-worth, and acquiring a range of hard (vocational) and soft (interpersonal) skills through their volunteering. For some people volunteering also provides a route to employment, for others it is a leisure activity enabling them to become part of a social world inhabited by those knowledgeable about heritage and history (Orr, 2006). Whilst volunteers obviously make an important contribution to the heritage sector in National Parks, any social benefits are anecdotal, with little robust research available on the social impacts of heritage volunteering in National Parks.

2.2.4 Education and wider learning

Heritage activities also have an important role to play in education and wider learning in National Parks, particularly delivering educational opportunities to children and young people (Borman, 2005). According to English Heritage (2007b), there were 2.5 million

school visits made to historic sites in 2006. Some 98 per cent of people interviewed by MORI in 2000 recognised heritage as an important means of teaching children about the past. Moreover, education often comes top of the list of the public's stated priorities for heritage investment. There is also a considerable body of evidence which has demonstrated that learning is both a motivation for, and a requirement of, visiting heritage attractions (Thomas, 1989; Herbert, 1989; Wearing and Wearing, 1996). Use of heritage for learning is supported by the Government who has indicated its enthusiasm for fostering more learning outside the classroom and using the built environment (historic and contemporary) more effectively for learning (English Heritage, 2007b).

In 2005, the Heritage Lottery Fund evaluated the impact of 50 HLF projects for curriculum linked learning for 5-19 year olds (HLF, 2005b). Improvements were noted in children's attitudes, behaviour, self-confidence and cross-curricular skills, but it was difficult to find evidence on educational outcomes in part because of the short duration of some activities, but also because outcomes are influenced by so many other factors.

Peacock, (2006) undertook a study examining the longer-term impact of out of classroom education through the National Trust Guardianship Scheme. Many of these schemes exist within National Parks, such as Windermere & Troutbeck in Lake District National Park, Watersmeet & West Exmoor, Exmoor National Park and Finch Foundry, Dartmoor National Park. Based on in-depth interviews with students, teachers and Trust wardens, it looked at the longer-term impact on knowledge, attitudes, behaviour, decisions and choices that young people make. He identified many social and learning benefits of schemes for school children and families, friends and community. The Gardom's Edge Project in the Peak District (Dymond, 1998) provides another good example of the educational benefits of heritage. This project incorporated an educational programme as part of an archaeological research excavation. This included bringing parties of school children, many from inner city areas, to the site.

The Museums, Libraries and Archives Council (MLA) have developed the Generic Learning Outcome (GLO) approach as a way to 'measure learning'. The GLOs provide a conceptual framework for designing evaluation projects, tools and reports and can be found on the MLA Inspiring Learning for All website (www.inspiringlearningforall.gov.uk). The outcomes are grouped under: knowledge and understanding, skills; attitudes and values; enjoyment, inspiration, creativity; and activity, behaviour and progression. The website provides a number of useful evaluation tools, such as interview guides, exit surveys, questionnaires. This approach has been rapidly adopted in the museum sector and may well prove useful in providing a framework to evaluate the extent to which heritage assets in the National Parks provide educational and learning benefits. It could also be used to identify areas where this provision might be improved.

There is considerable debate in the educational world about the difficulties of 'measuring' learning, especially in relation to informal learning or the 'soft outcomes' (attitudes, key skills, learning skills, etc) (Hooper-Greenhill, 1994). The impact of cognitive development - the learning of new facts, ideas and concepts - is particularly

difficult to measure due to the long term nature of any impacts (Peacock, 2006). Whilst evaluation of heritage activities has identified the benefits of heritage to education, not enough is known about the impact that this has on actual educational attainment.

Measuring the social impacts of participation in heritage provision

A great variety of approaches have been used for assessing the social impact of participation in the heritage sector: none are suitable for all situations and all have advantages and disadvantages. In general, qualitative data provides the grounding for quantitative approaches by identifying useful indicators. At present project evaluations are a frequently used source of evidence of social and learning impact. However, Wavell et al (2002) suggest that the quality varies tremendously and they are more to do with immediate outcomes than really getting to grips with longer-term impacts.

Social impact research in the heritage sector is influenced by a large-scale study of participatory arts initiatives conducted by Matarasso (1997). The research divided the social impacts of participation in the arts into six different themes:

- *Personal development.* Where the change is at an individual level, such as in confidence, education, skills and social networks;
- *Social cohesion.* Where arts projects bring people together, promote intercultural and intergenerational understanding, reduce fear of crime, etc;
- *Community empowerment and self-determination.* Where projects can help to build organisational skills and capacity, encourage consultation and democratic participation, strengthen support for community-led initiatives, etc;
- *Local image and identity.* Where projects can help to develop a sense of place and belonging, or transform the image of local groups and bodies;
- *Imagination and vision.* Where participation in the arts can help to develop people's creativity and confidence about the arts, or encourage people to take positive risks;
- *Health and well-being.* Where participation can help people feel healthier and happier.

More recently, AEA Consulting (2005) has developed a logic model for evaluation and recommended ways to plan, enhance and measure the social impact of museum programmes. Initially, the museum should determine and articulate its desired social impact goals for chosen audience segments. Matarasso's six major categories and the MLA's Generic Learning Outcomes are suggested as useful guides in this process. Once the goals are determined, then the evidence that will demonstrate the achievement of the desired results needs to be clarified, and the simplest ways to collect that evidence outlined. For example, if the museum wishes to impact the social cohesion of its broad community audience, evidence might include a postcode analysis of visitors that demonstrates increased diversity among the museum's regular visitorship.

The research undertaken by AEA Consulting has fed into the development of the Extended Generic Learning Outcomes methodology developed by MLA Councils (Wilkinson, 2006). This method uses a social capital-based methodology to find a way of

establishing what the social outcomes of the work of museums might be. The methodology maps outcomes against activities and requires an analysis of the perception of individual participants in programmes to be triangulated against the views of group leaders and of the museums. Again, this methodology could be usefully adapted to establishing the social impacts of heritage sites and museums in National Parks. Adopting this methodology would enable a measurement of the social outcomes of heritage sites and activities in National Parks and the impact they have on people's lives.

2.2.5 Research gaps: Public and social

This section of the review has identified that heritage has the potential for a wide variety of social benefits within National Parks, but that there are inherent difficulties in measuring them. This area of research is still in an early stage of development and whilst some attempts have been made there remain significant gaps in the research. Furthermore, there is a paucity of research looking specifically at the social impact of heritage in National Parks.

The majority of the research examining the social benefits of heritage activity relates to the impact of participation in such initiatives on individuals and communities. There is currently much less research available on trying to measure the intrinsic value of heritage, including the aesthetic and spiritual (or religious) value or the value in creating a sense of identity or place and a connection with the past.

Research into local distinctiveness and sense of place is still in the early stage of development. Stubbs (2004) suggests that the sense of place dimensions of past work lacks an analytical framework. He suggests the need to test the extent to which the environmental capital approach can be exported to address issues that deal with local distinctiveness and sense of place. DCMS recognised this lack of research and a key conclusion from 'A Force for our Future' (DCMS and DTLR, 2001) is the potential that exists for more work on the links between heritage and the creation of a 'sense of identity or place'.

Most of the evidence on the social impacts of heritage is anecdotal or is based on case studies and relates to the immediate or very short-term results of an activity. More longitudinal research studies are required to gain a comprehensive picture of the social benefits, particularly in relation to the role and development of social capital and the impacts of heritage on educational learning.

There is also very little evidence available on the impacts of participation in heritage projects on local communities in National Parks, any such project is likely to have positive social impacts on the community. Also like other rural areas of the UK, National Parks face the challenge of engaging young people and ethnic minorities in heritage activities by making them both interesting and relevant. Research is required to identify the needs of young people and to determine how these can be met. The health and wellbeing review identified significant gaps in the literature of using wellbeing

concepts and methods in the context of heritage. For example, there is little evidence for a causal link between funding for a National Park and a saving in health costs. More work is required to investigate how to use these measures and to investigate the role of the historic environment to people's wellbeing (particularly mental wellbeing (Newton, 2007)).

Wavell et al (2002) identified a number of gaps in measuring the social impact of museums. There is little evidence of longer-term impact or the causal relationship between Museum sector use and impact, particularly in relation to cognitive learning and decision-making. The same applies to the educational benefits of heritage, including the impact on educational attainment (Peacock, 2006). Wavell et al (2002) also identified a lack of research into the therapeutic benefits of interaction and engagement with museums.

Whilst it is recognized that there are a large number of volunteers involved in the heritage sector within National Parks, there is little evidence of the impact of these volunteers both socially and economically and research in this area would be valuable. Finally, further research is needed to develop consistency of indicators, data collection, and analysis in order to facilitate comparative research. A sector-wide methodology is required which would allow comparison of public values across heritage sites.

2.3 Economic benefits of heritage

In this section two main approaches to measuring the economic benefits of heritage are discussed: those derived from the Environmental Economics literature (See section 2.3.2), and those grounded in the literature on Regional and Rural Economics (See section 2.3.3). The key difference between these two groups of methodologies is that the former is concerned with the benefits of heritage to the wider economy and society, while the latter has a particular focus on economic impacts within distinct geographical territories, which has particular relevance for examining the local rural development benefits of heritage in defined regions or sub-regions. In both cases the literature relating specifically to heritage and the historic environment within National Parks is limited, although there are a variety of methodological approaches which are readily applicable to the case of heritage in National Parks.

This section of the review begins with an overview of economic valuation approaches, within which the rationale for pursuing economic valuations of heritage in National Parks is briefly discussed.

2.3.1 Economic valuations and approaches

There are two main reasons for using economic valuation techniques to inform heritage-related policy decisions (Mourato and Mazzanti, 2002). Firstly, public institutions are increasingly being asked to justify their spending or funding requests in terms of social and environmental benefits. Secondly, in an increasingly competitive market place there is a need to find out what the consumer wants in order to market the heritage asset appropriately. According to Mourato and Mazzanti (2002), *“neglecting to take into account the economic value of cultural heritage conservation and the full costs and benefits of policies, regulations, and projects with cultural components can lead to suboptimal allocation of resources in the sector, investment failure, and continuous degradation of the world’s cultural assets”* (p. 52).

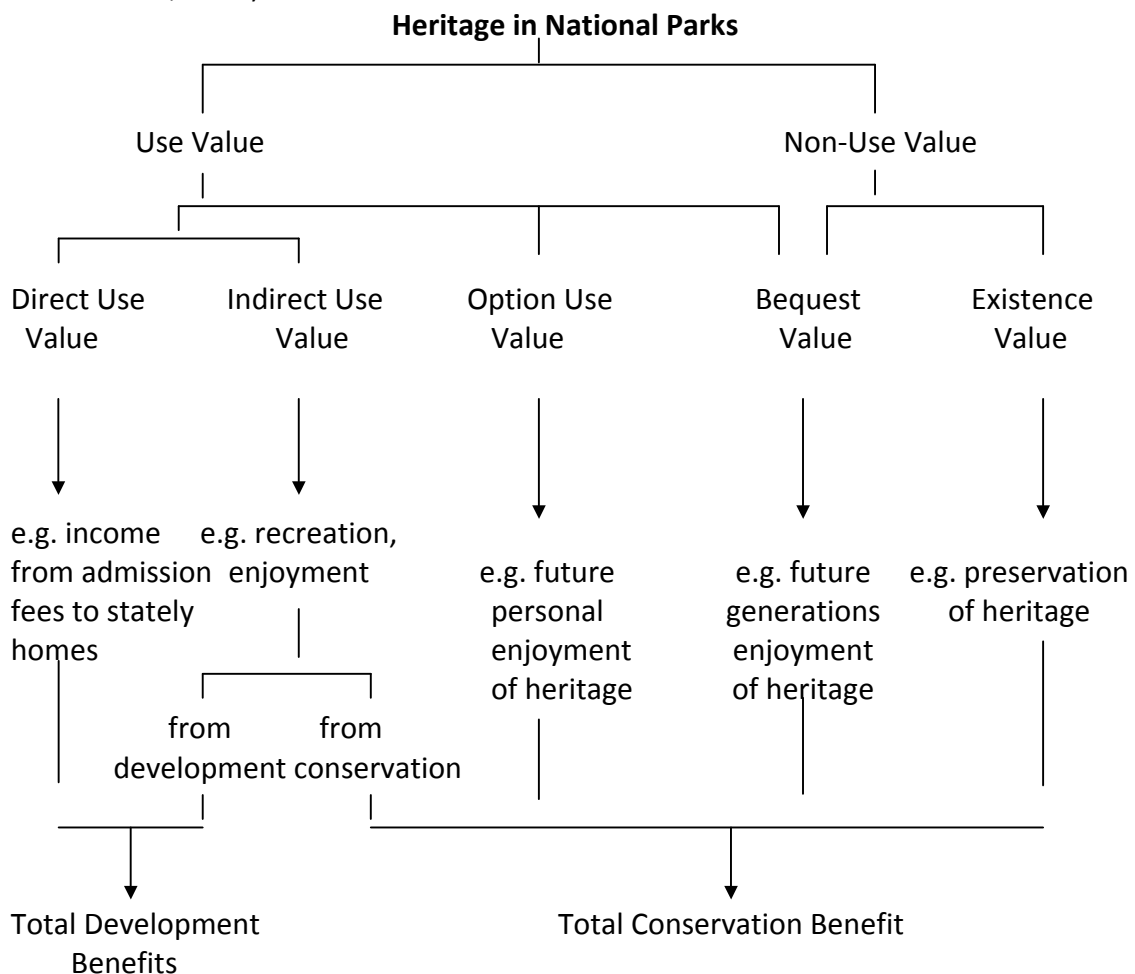
Valuing the economic contribution of heritage in National Parks is integral to informing strategic decision-making which will ensure that resources for heritage-related projects and schemes are appropriately targeted. Not only is this valuation crucial for assessing the benefits of heritage policies and projects against their costs (Treasury, 2003), it is also crucial to recognise the wider contribution of heritage to rural development (Courtney *et al.*, 2006), both within the National Parks and their surrounding regions.

Heritage is similar to environmental goods in that it is typically a *public good*. In economics, a public good is something that is impossible to produce for private profit because providers are unable to acquire profit from their provision. Public goods are non-rivalrous, meaning that once produced, everyone can benefit from them without others’ enjoyment being diminished and non-excludable, meaning that

it is difficult to prevent access to them. Heritage goods vary in their degree of excludability. Thus, in the case of stone walls, for example, it would be impractical to try to charge admission to areas of landscape with stone walls. However, visitor attractions such as slate mines are excludable, as access can only be gained by paying an admission fee.

“Value” has a very definite meaning in economic terms. At its most fundamental level, value is related to the philosophical idea of “good” (Eftec, 2005) and is derived from individual preference. In order to determine value, we need to compare non-market goods to market goods. Market goods have a market price, but price is not always an indicator of value (Navrud and Ready, 2002). A consumer may be willing to pay more or less than the market price for a good. This is termed the *consumer surplus* and represents the marginal cost or benefit of a good. So, for example, the entrance fee to an historic site might be £2.50. The consumer may actually be willing to pay £4.00 to visit the site, representing a consumer surplus of £1.50 per visit. The sum total of all visitors’ consumer surplus represents the marginal benefit of the site. Total economic value (TEV) includes a valuation of both use and non-use values, as illustrated in Figure 2.1

Figure 2.1: The total economic value of heritage in National Parks (Adapted from Turner et al., 1994).



The economic value of heritage in National Parks does not just consist of admission fees, but encompasses a wide range of use and non-use values which can be valorised (Figure 2.1). Use values can be ‘direct’ (i.e. admission fees) or ‘indirect’ (i.e. functional values in terms of recreation, enjoyment etc.). Option values relate to the option of protecting the resource for future use, and can also be direct or indirect. Non-use values include existence values, the value of preserving the resource as part of the landscape, and bequest values - the value associated with passing on the resource to future generations.

2.3.2 Environmental Economics

As with environmental valuation, there are two main approaches to heritage valuation: stated preference methods and revealed preference methods. Stated preference methods are where a value is estimated from what a respondent says they will do in a certain situation; this value is estimated through the use of a hypothetical market situation. Revealed preference methods examine participants’ actual behaviour and use a “surrogate market” as a proxy for estimating value, such as house prices or travel costs. A summary of the available methods is given in Table 2.1.

Table 2.1: Economic valuation methodologies applicable to heritage

Stated Preference Methods	Revealed Preference Methods
Contingent Valuation	Hedonic Pricing
Choice Modelling/Conjoint Analysis	Travel Cost Methods

Relatively few (50) national and international valuation studies relating to heritage were identified in this literature review (see Appendix 1 of the Technical Annex), with some involving overseas National Parks and world heritage sites and others only covering heritage sites and other designated areas in a UK context. Of these, 49 used stated preference methods, with only 5 using revealed preference methods (some studies use both stated and revealed preference methods). For comparison, there are literally thousands of valuation studies for environmental goods. Given that a number of successful heritage studies have been carried out in comparable areas, therefore, heritage valuation using revealed preference methods represents a particularly fruitful area for research in English and Welsh National Parks. The four valuation methodologies listed in Table 2.1 are outlined in the following sub-sections.

Stated Preference - Contingent Valuation (CV)

The most widely used method in the heritage valuation literature is contingent valuation (CV), a stated preference method, with 38 of the studies cited in this review adopting CV. CV involves asking participants how much they would be willing to pay for an aspect of heritage to be conserved, or how much they would be willing to accept as compensation for its loss (Turner et al., 1994; Hanley *et al.*, 2001; Navrud and Ready, 2002; Perman et al., 2003; Eftec, 1999). The basic method for CV is asking respondents how they would behave if a hypothetical market for

environmental (or heritage) goods existed (Hanley et al., 2001; Kim et al., 2007). Willingness to pay (WTP) can be elicited in various ways. Often it involves an open-ended elicitation question for a respondent's WTP. Alternatively, the dichotomous choice format asks the respondent to reply 'yes' or 'no' according to whether their WTP exceeds a specific amount (Noonan, 2003).

Since the first CV study about 40 years ago, numerous studies have applied CV in a variety of fields such as environmental or natural resource management (Hanley and Nevin, 1999; Johnson and Baltodano, 2004; Martín-López *et al.*, 2007), recreation (Jim and Chen, 2006; Lee and Han, 2002; Boxall *et al.*, 2003) and forestry (Tyrväinen, 2001; Christie *et al.*, 2007; Matta *et al.*, 2007). CV has also been used to a lesser extent for a variety of heritage-related valuation studies (see Appendix 1 of the Technical Annexe²), including estimating WTP for the preservation of canals in Britain (Adamowicz *et al.*, 1995), preferences for avoiding visitor congestion in a National Trust property in England (Brown, 2004), assessing the contribution of aboriginal rock paintings to wilderness recreation values in Canada (Boxall *et al.*, 2003), examining the economic benefits of the restoration of the Fes Medina in Morocco (Carson *et al.*, 2002), estimating WTP for an increase in admission fees in National Parks in Korea (Lee and Han, 2002) and estimating the use value of a World Cultural Heritage site in Korea (Kim *et al.*, 2007).

Studies such as Clark *et al.* (2000) and Brouwer *et al.* (1999) which critique traditional CV techniques, conclude that participants prefer a more participatory and deliberative approach to decision-making. Thus, some researchers have attempted to integrate a qualitative, participatory element into the CV process (Macmillan et al., 2002; Philip and Macmillan, 2005; Lienhoop and MacMillan, 2007). CV Market Stall, as it is known, has evolved out of the successful application of Citizens' Juries in environmental decision-making. In a study which looked at the difference in WTP values between traditional CV and CV Market Stall, Macmillan *et al.* (2002) found that mean WTP was higher in a traditional CV survey than in CV Market Stall. WTP values derived from the CV Market Stall approach were 3.5 times lower than the traditional CV approach. Since studies that compare actual WTP values with the hypothetical CV WTP show that CV WTP usually exceeds actual WTP by a factor of 2-10 (Duffield and Patterson, 1992; Navrud and Veisten, 1996; Champ *et al.*, 1997), it is highly plausible that CV Market Stall WTP is closer to actual WTP. These findings would imply that the application of CV Market Stall may prove a more reliable method of eliciting heritage values in National Parks than a straightforward CV.

Noonan (2003) conducted a meta-analysis of cultural resource valuation studies; of the 72 studies cited only 46 can be considered heritage-related. Other studies include Kim et al's (2007) dichotomous choice survey of visitors to a world heritage site; Ruijgrok's (2006) estimation of recreation and bequest values of cultural heritage in the Netherlands; various CV and WTP of wider environmental valuation (See for example, Portney 1994; Macmillan et al., 2002; Mason, 2005); and other studies assessing the usefulness and limitations of such studies (See for example,

² A summary version of Appendix 1 can be found in the reference list of this report.

Clark et al 2000; Throsby, 2003). Such studies, while indicating the potential for CV studies to inform heritage planning and policy making in National Parks also highlight the problems and limitations of the approach, in particular the fact that WTP estimates are dependent in part on information about the good in question, which for heritage goods is usually acquired over time or through repeat exposure. While the dearth of studies relating specifically to heritage in National Parks makes this a fruitful area for research, a major limitation at present is a clear understanding of what National Park heritage constitutes and how it is perceived and understood by the entire range of stakeholders, from park managers through to residents and visitors. This would need to be addressed first.

Stated Preference - Choice Experiment/ Choice Modelling/Conjoint Analysis

Although the CV technique has been the most widely used evaluation approach in heritage studies, its validity for heritage tourism is questionable, due to the multi-attribute nature of heritage resources (Apostolakis and Jaffry, 2005). The choice experiment or choice modelling approach is a stated preference technique originally developed for use in marketing and transport policy contexts (Eftec, 2006). The technique is similar to CV, but it allows respondents to choose from multiple alternatives (Apostolakis and Jaffry, 2005). It presents respondents with a number of choices or attributes relating to a particular issue and asks respondents to rank their preferences. Each attribute has a price attached and analysis allows the marginal WTP for each attribute to be calculated (Eftec, 2006).

For example, in order to ascertain why people visit particular historic sites, participants would be asked to rank various attributes (price, aesthetics, sense of place, etc.) that may contribute to their reason for visiting (Mason, 2005). This approach allows for a more nuanced understanding of people's motivations for visiting heritage sites, instead of a broad WTP which cannot distinguish between visitor-enhancing attributes.

A limited number of studies have adopted choice modelling to evaluate heritage attractions, including Costa and Manente's (1995) study on heritage attractions in Venice, Morey *et al's* (2002) study on marble monuments in Washington, Mazzanti's (2001) study on Italian cultural resources and Maddison and Foster's (2003) examination of congestion at the British Museum. Other studies include Campbell et al's (2007) evaluation of improvements in landscape features in the Rural Environment Protection Scheme in Ireland which showed that inconsistent responses could be a problem if choice modelling is not properly managed. Although this review has revealed no choice modelling work specifically on heritage in National Parks, there is considerable scope to pursue the approach in English and Welsh Parks, which could be useful to park managers and policy makers for resource allocation, heritage site management and tourist zoning. Again, a robust study design would benefit from an initial study to map heritage understanding in order to appropriately capture heritage attributes.

Hedonic Pricing Method

As with all stated preference approaches, CV and choice experiment methods focus on what people say they would do, not on their actual actions. Alternatively, revealed preference approaches, such as hedonic pricing, attempt to infer the value people place on environmental goods by their actual behaviour (Hanley *et al.*, 2001). Hedonic pricing (HP) asserts that house prices are determined, in part, by the characteristics (such as environment or heritage) of the surrounding location (Eftec, 2006). The assumption is made that people will choose to live in areas where their surroundings will improve quality of life (Hanley and Spash, 1993). The economic value of heritage features can effectively be estimated by regressing the sale price against factors thought to affect the price (Eftec, 2006), in other words examining the relative impacts of heritage and other factors on sale price and deriving values from the coefficients for each variable in the model. Thus, monetary values can be placed on heritage with respect to their effects on house prices (Hanley *et al.*, 2001).

This literature review found only one study that used the HP method to explore cultural heritage. Ruijgrok (2006) combined the use of CV and HP to calculate the economic benefits of conserving the most threatened types of cultural heritage in the Netherlands. The results showed that the historical characteristics of buildings and the surrounding area account for 14.85% of property values (Ruijgrok, 2006).

While the HP method has been little used for heritage valuation, it would be an appropriate technique for ascertaining the additional heritage value of properties located in or adjacent to National Parks which border historic buildings or which benefit from other heritage landscape features. Such values could, for example, provide policy makers with hard evidence of the value of heritage features to National Park economies through asset values as well as the quality of life benefits of heritage as distinct from those arising from the wider natural environment. There is therefore considerable potential for application of this method in the present context.

Revealed Preference - Travel Cost Method

A revealed preference approach to environmental valuation which attempts to avoid the subjectivity of human preference is the Travel Cost Method (TCM). TCMs were the first form of environmental valuation, used in the United States to manage recreation in National Parks and are now widely used for valuing the non-market benefits of outdoor recreational resources, including forests and woodlands (Hanley and Spash, 1993). Carson *et al.* (2001b, p. 109) suggests that TCM is “the most popular technique for measuring total value for goods having significant passive use values.” TCMs are based on the assumption that time and expenditure is incurred in travelling to recreational areas and, from this, the recreational value can be inferred (Perman *et al.*, 2003). A statistical relationship can be determined by constructing demand curves for the observed visits and the cost of visits to estimate a consumer surplus, reflecting the amount that consumers benefit from making visits to heritage sites at a cost which is lower than they would be willing to pay.

The main application for the TCM approach is valuing heritage sites that have explicit recreational value, such as stately homes, castles or National Parks. It can be a useful tool for evaluating appropriate pricing for entrance fees. However, most heritage valuation studies have employed stated preference techniques, particularly CV (Pearce *et al.*, 2002). Examples of the use of TCM include Alberini and Longo's (2006) estimate of the conservation values of heritage sites in Armenia and Bedate *et al.*'s (2004) calculation of consumer surplus for cultural goods in Spain.

The TCM does have some limitations in its applicability. Firstly, it can only estimate visitor values (use values) and is only useful when visiting the site involves significant travel. Secondly, problems can occur when other substitute heritage sites exist; the travel cost involved in visiting one site may be shared with another site when both sites are visited on the same trip, thus making it prone to inaccuracies. Given the nature of National Parks, which contain many substitute sites, this obviously represents an important drawback of applying a TCM in the present context. A useful application would be to employ a series of individual TCMs on different types of site across a number of National Parks and attempt to transfer values to un-surveyed sites based on site, visitor and other characteristics.

Summary

The above review of the environmental economics literature has revealed the great potential of a number of established techniques to measuring the non-market values of heritage in National Parks but it has revealed a dearth of existing empirical evidence, particularly in an English and Welsh context. Establishing a number of inter-related studies to estimate heritage values should be relatively straightforward although it would be useful at the outset to more carefully define heritage and its various attributes, and the understanding of it by the various types of stakeholder, before embarking on any empirical research. In particular, the multi-site nature of National Parks combined with the multi-attribute nature of their heritage resource, will require careful consideration, as will the need to appropriately disaggregate the historic environment of parks from the wider natural environment.

As well as recognising the limitations of economic valuation in general, there are further methodological implications associated with the use of particular techniques. Given that evaluating public goods such as heritage can be time consuming and expensive, benefit transfer is often considered, whereby benefits are estimated for a site whereby data is collected using the various techniques outlined above and transferred to a comparative site for which data is not available. However, evidence to date suggests that the valuation of heritage is too situational to extrapolate widely and that applying benefit transfer to the existing variety of studies is unlikely to reap valid results (Kaval and Loomis, 2003). Many more heritage valuation studies, conducted in a systematic and strategic way, need to be conducted before reliable benefit transfer methods can be applied. Following collection of robust, primary data, however, benefit transfer between National Parks in England and Wales is a realistic aspiration in that they share a number of common attributes and comparable heritage features.

Although environmental economic techniques are increasingly used to explore social/policy choices and to evaluate policies, they do have limitations. While these methods have merit in that they allow an economic valuation of a non-market, or public, good to be estimated, they may fail to bring to light important intrinsic values or miss out other social or symbolic values that cannot be converted into economic terminology (Throsby, 2003). Thus, identifying the full set of values related to an environmental issue is messy, tangled and complex and ideally needs to be considered in tandem with the social benefits of heritage discussed in the previous section

2.3.3 Heritage and wider Regional Economics

An important distinction between regional or sub-regional economic benefits and those discussed in the previous section, which deal with the non-market benefits of heritage to the wider economy and society, is a focus on the spatial distribution of benefits which accrue to economies (and in turn their communities) in a defined geographical area. As discussed briefly in section 2.2.1 such benefits relate broadly to 'instrumental' values in that the interest here is in the tangible benefits that can arise from the funding, preservation or management of heritage. In a spatial context, such benefits can be measured either in monetary terms (as flows of monetary units arising out through upstream or downstream linkages), or in non-monetary terms (i.e. employment generated, either directly or indirectly, through heritage activities).

A number of studies with direct application to the economic impacts and benefits of heritage and National Parks have drawn upon various theoretical approaches, including many which utilise and manipulate spatial economic data, such as input-output modelling, local multiplier models (i.e. LM3), Social Accounting Matrices (SAMs), and econometric techniques to estimate regional and sub-regional economic integration. In turn these techniques have direct relevance to rural development. A handful of these studies have involved National Park regions and sub-regions, with a limited number focussing specifically on heritage in National Parks. These studies allow potential for further development of methodologies, roll-out of established methods in further case studies and/or extrapolation of findings to un-surveyed parks using appropriate benefit estimation techniques.

Heritage and Rural Development

The term 'rural development' has been interpreted in a number of different ways by academics and policy analysts over recent years, although as van der Ploeg et al. (2000) concede, no comprehensive definition of rural development has yet to emerge. According to Sotte (2002), rural development refers to the provision of non-agricultural functions and employment in rural areas, fostering exchanges between sectors and territories. Errington's (2002) definition, however, is more inclusive, albeit human-centred, asserting that rural development involves premeditated changes in human activity which seek to use resources (and in this case heritage-related resources) within the rural arena to increase human well-being.

Here we are interested principally in the contribution of heritage assets and activities to the generation and retention of income and employment in the rural economy, through an examination of the local economic linkages associated with the activity. In this case, the local economy of interest is that of National Parks, defined by the park boundaries themselves, and more realistically including the wider zones of influence that National Parks exert on the sub-regional economy. The following section provides a theoretical perspective on the relationship between economic linkages and rural development more generally.

Economic Impact Studies

Economic impact studies have been popular among policy makers during the last twenty years or so because they indicate that expenditure on heritage goods have economic returns (Klamer & Zuidhof, 1999). As such they are the most widely used and frequently cited type of economic analysis of heritage (Mason, 2005). These studies do not directly measure the (subjective) value of heritage but are designed to gauge the effect of particular investment and spending activities on a regional economy. The assumption is that the flow of economic activity multiplies the benefits of the initial investment, producing positive externalities (Mason 2005). The literature reveals two types of economic impact studies in relation to heritage: those that estimate economic impact of using existing heritage assets and those that identify the impact of funding on the restoration of heritage assets to stimulate local economic development. Economic impacts may relate to, for example, the use of particular heritage assets, such as museums (South West Museums Council, 2000; Travers and Glaister, 2004; Price Waterhouse Cooper, 2003), cathedrals (Ecotec, 2004) or rehabilitation work on farm buildings (Edwards et al, 2005; Courtney et al, 2007a), waterways (Ecotec, 2003) and natural heritage (Courtney et al, 2006; Tourism Associates, 1999; Mills et al, 2000).

Many estimates of income and employment generation resulting from heritage, apply both the Keynesian multiplier model and input-output analysis. Both approaches allow the calculation of the value of the multipliers as the ratio between the income and employment generated and the initial input/investment. Input-output models go further than the Keynesian multiplier method as they provide estimates of the multiplier values for economic sectors, other than those directly involved in heritage. These models not only estimate the income and employment directly stemming from the initial round of expenditure, but also that arising from indirect and induced effects.

Economic impact studies of National Parks

Economic impact studies have varying approaches particularly with respect to the use of the multiplier concept and whether impacts are genuinely additional (English Heritage, 2005). Multiplier studies either make use of existing input-output tables or are based on more resource intensive survey approaches. Two economic impact studies have identified the economic impact of National Park designation. The first is Hyde and Midmore's (2006) study of the economic impact of National Parks in Wales, which employed a gravity-based input-output model. This method used

National input-output tables which were modified with local data on employment and centres of gravity based on Annual Business Inquiry data supplemented by original survey work. The approach is not as accurate as a primary survey, but Hyde and Midmore (2006) argue that it is cost-effective and the most accurate estimator of the non-survey approaches. The authors found that the environment of the three National Parks in Wales supports nearly 12,000 jobs; produces a total income of £177 million and generates £205 million GDP per annum. Also much of the economic benefit of the Parks occurs outside their boundaries, so they conclude that the Parks support not only their local economies but also the economy of Wales as a whole. Whilst an extremely useful baseline, the study did not examine the distinct contribution of heritage or the historic environment, but did produce estimates of GDP contribution for each industrial sector, which indicated that on average the recreation, culture, and welfare sector contributed to 45.75% of GDP across the three parks.

The second study was based on a survey approach and examined the economic impact of National Parks in the Yorkshire and Humber region (Council for National Parks, 2006). The study found strong evidence that businesses in the Parks and nearby towns benefited from the quality of the protected landscape and from the Park designation. The consultants assessed the added value of National Park designation by surveying 319 business located in the National Park and Wolds and tested for a 'halo' (i.e. indirect through impacts further upstream and downstream) effect by surveying a further 100 businesses in 'gateway' towns outside the Park boundaries. They also assessed the additionality of National Parks linked to designation and landscape protection and tested the extent to which the Parks are used as a marketing tool through a survey of organisations involved in business support or inward investment. Survey data revealed that the Parks' businesses generate £1.8 billion in sales annually, supporting over 34,000 jobs and around £576 million of Gross Value Added. National Park designation was found to have had a major positive impact on a quarter of all surveyed businesses, which were estimated to support over 8,000 jobs. Again, while it recognised the important contribution of cultural and natural assets to economic stimulus in and around parks, this study did not specifically estimate impacts of heritage or the historic environment. Nevertheless, the findings do provide some useful baseline data to inform further studies, and to apply in a heritage context.

Other studies which have examined the spatial economic impacts of conserved environments include the National Trust's (1999) impacts of their own direct spend on trust-owned farms; and Bilsborough and Hill's (2002) Welsh study, which also estimated the regional impacts of various activity sectors related to the historic environment. In the USA a large number of state-wide studies of the economic impact of historic preservation have been undertaken, with the majority showing preservation to have significant economic benefits (See for example Hardner and McKenney, 2006; Clarion Associates and BBC Research and Consulting, 2005). A similar programme of research would be invaluable for National Parks in England and Wales by providing a nationwide baseline of the heritage's economic contribution in

National Parks at various spatial levels, which could help inform both regional and national decision making.

Economic impact of funding for heritage projects

Further studies have looked at the economic impact of external funding for heritage assets. ECOTEC (2006) used 10 case studies to provide an indication of the local economic impacts generated by Heritage Lottery Fund (HLF) funded assets. Key elements of the assessment were: the impacts of project-related spend; employment and incomes generated within the development itself; the additional expenditure within the local economy by visitors; employment and incomes generated in the non-visitor related developments which have been undertaken; indirect effects down the supply chain associated with the procurement spend of the site and purchases from other businesses by the firms which also benefit from this; induced effects associated with the local spend of all of those which derive additional incomes from the project through the other mechanisms; and the wider impacts of the redevelopment of the site on the local community and economy.

English Partnerships has produced a guide to assist with assessing the additional economic impact of projects (English Partnerships, 2004). As well as considering regional and sub-regional economic multiplier and trickle down effects of projects and programmes they suggest that the assessment should also consider:

- Leakage effect: the number or proportion of outputs which benefit people or businesses outside the study area and are therefore deducted from gross direct benefits;
- Displacement: the number or proportion of outputs accounted for by reduced outputs elsewhere, for example attracting jobs which would have been located inside or outside the study area; and
- Substitution effects: the effect where one activity is substituted for another

Following these guidelines, studies by Edwards et al (2005) and Courtney et al (2007a) looked at the multiplier effects of grant funding for restoration of traditional farm building (Lake District and Yorkshire Dales National Parks) and stone walls (Yorkshire Dales National Park). Local economic impacts were estimated in terms of direct, indirect and induced effects using an adapted Local Multiplier 3 (LM3) model (Sacks, 2002) and accounted for additionality and displacement. The data used in the model was derived from a survey of agreement holders, building contractors and suppliers involved in the grant funded restoration work. In the Lake District the Environmentally Sensitive Area (ESA) farm building renovation scheme had generated between £8.5 million and £13.1 million for the local economy between 1998 and 2004. It calculated a minimum multiplier of 2.49 demonstrating that local inter-industry linkages in the study area were strong. In the Yorkshire Dales National Park, allowing for direct, indirect and induced effects, building and walling schemes resulted in a total injection of between £7.08 million and £9.12 million to the local economy between 1998 and 2004, with a wider local multiplier of 2.48 (or 1.92 for walling). Building and walling work was carried out by local firms and is estimated to

have created 74 jobs in the National Park and its wider local area over the same period. Of these, 41 full time equivalent jobs were created by building schemes and up to 33 jobs created through walling schemes, with around 23 of these generated as a result of direct employment on walling projects.

Other studies examining the impacts of heritage funding include those which have looked at the economic impact of museums (Travers and Glaister, 2004; Price Waterhouse Cooper, 2003); Mills et al, (2000) study of economic impacts of hedge restoration funding in Devon; Harrison-Mayfield et al's (1998) study of the socio-economic effects of the Countryside Stewardship Scheme and Courtney et al's (2006) examination of the role of the contribution of the natural heritage in Scotland, employing a methodology that could be usefully adapted to the historic and cultural heritage in National Park context. Further adaption of such studies would be extremely useful in helping to estimate the contribution of heritage assets and features to economic growth and rural development in and around National Parks.

Social Accounting Models

An alternative to economic impact studies is the use of social accounting matrix (SAMs) models which have been widely used to capture linkage within regional and national economies, but are not so easily adapted to the sub-regional scale. A Social Accounting Matrix (SAM) is an analytical framework in which social and economic data are integrated. The SAM links together the stocks and flows within the economy with the statistics of the labour market and of households. It provides an elaboration of the interactions between the economic stocks and flows and the people and organisations, such as government, individuals and households. In a SAM, the accounts are shown in a matrix, in which the rows represent the resources and the columns display the uses.

There are relatively few examples of inter-regional models, with the most relevant to National Parks being Roberts' (1998) rural-urban SAM model of the Grampian region. A SAM is used to quantify the relative importance of traditional (supplies and services for export) and nontraditional (sales to non-locals visiting the area, demands from local residents with extra regional funding sources and public transfer payments direct to households) elements of the economic base of rural areas. Findings illustrated the importance of central government funding of public services. They also indicated that exogenous transfers of income direct to households supported 8% of jobs and 7% of factor earnings in the region.

Other relevant studies include Courtney et al's (2007b) use of SAMs to assess the potential role of small towns as growth poles in rural development and Harrison's (1993) and Mills et al's (2000) measurement of the local interdependencies of farm businesses using survey based spatial tracking techniques. Again, there is considerable potential to extend and adapt the methodologies used in these studies to the case of heritage in National Parks to help comprehensively establish the benefits of heritage to rural and regional economic development, but also help inform planning and policy, for example through targeting support at specific

sectors, sites or heritage feature, to help ensure that such benefits can be maximised in National Parks.

2.3.4 Research gaps: Economics

Environmental Economics

The limited number of heritage value studies and the broad range of situations that they cover indicate that more research is required on a diverse array of heritage goods, both within and beyond National Parks. New valuation studies are needed to address particular policy issues, rather than generic studies to seek the value of goods. For example, ascertaining the amount a visitor is willing to pay to visit a stately home, while useful, gives no indication of what aspects of their visit are important and so has limited use in guiding which features should be preserved or restored. In a National Park context there exists great potential to augment the existing evidence base with studies to examine the Total Economic Value (TEV) of heritage in National Parks, incorporating many aspects of heritage assets (including cultural aspects), both fee and non-fee paying sites and encompassing both Stated and Revealed Preference methods. In particular, the review has identified a current gap in the literature for studies utilising the CV Market Stall methodology in the context of heritage in National Parks, which overcomes a number of limitations associated with traditional CV studies.

In order to guide future heritage valuation research, there is also a need for the development of a conceptual framework which recognises the multi-faceted and inter-related elements that influence heritage values and people's perceptions and experiences of heritage. A database of information relating to heritage market and non-market values which ultimately is comparable and transferable across National Parks, and across various heritage attributes (i.e. historic buildings, monuments, field boundaries etc), is required, and its compilation will require the application and integration of a number of methodologies, spanning both environmental and economic geography. In this regard, valuation studies would benefit from a trans-disciplinary research. The valuation of heritage assets spans a variety of fields, such as culture, sense of place, the built environment and history and a conceptual model needs to encompass all of these dimensions, values and attributes. Indeed, Mason (2005) calls for "new, hybrid, collaborative research to bridge some of the gaps" (p. 21).

Through the application of a conceptual model for heritage valuation, appropriate and reliable methods of inquiry can be developed. Since heritage goods are multi-dimensional, multi-value and multi-attribute economic goods (Mazzanti, 2002), these methods are likely to include approaches such as CV, Travel Cost, CV Market Stall and choice modelling. Such methods are more deliberative and allow for a more nuanced understanding of the relative value of various attributes and spatial distribution of heritage to be considered. They are also particularly applicable for presenting a range of policy scenarios so that tradeoffs can be assessed and choices made. Their application in National Parks could, for example help inform policy at

various levels by providing a comprehensive assessment of the value of heritage resources to National Parks, and of the value of National Park heritage to wider society.

Rural and regional economics

A programme of National Park-wide studies, similar to that undertaken in the United States, which has explored the economic impact of historic preservation, is required to provide a national overview of the economic benefits of heritage in National Parks. These studies should include economic activity related to historic feature restoration, heritage tourism, historical attractions operation and natural heritage management, and as such findings would help in the formulation of national, as well as park, policy. A systematic survey of employment in, and expenditures by, the different organisations involved in the heritage sector is also required. A useful starting point would be to run some pilot projects in a sample of National Parks, before testing the extent to which secondary or proxy data can be incorporated to make for a more efficient and cost effective roll out of a research programme across all English and Welsh National Parks. Importantly, such research should consider both local and regional impacts, and encompass the potential halo effects, both of activities indirectly associated with the heritage resource and the impacts (including income and employment multipliers) of National Park activities on the wider regional economy.

To counter the criticisms of failing to account for the opportunity costs of heritage investment (i.e. the value forgone by investing in heritage as opposed to something else), more research needs to be focused on its relative economic impact compared to other kinds of investment. Extending Courtney et al's (2006) methodology (for identifying heritage-related sectors and then comparing their local economic impacts relative to other sectors) to capture the cultural and built heritage could prove useful in this regard. Again, this research is more advanced in the USA, where, for example, Rypkema found that heritage preservation had a greater impact on the local economy than manufacturing, mainly because of its greater use of local labour and materials (Rypkema, 2001).

DCMS (2004) suggests the need for a greater quantity and quality of evidence for the economic impact of heritage projects, including research into the extent to which job creation is 'new' or displaced from other locations. Courtney et al's (2007) methodology is sufficiently developed for this purpose and could usefully be rolled out to further National Parks and examine benefits of various forms of heritage feature and their management. The research to date has been useful in highlighting the wider benefits of grant support for farm building and walling restoration in the Lake District and Yorkshire Dales, and further research – both in terms of heritage features and National Parks – is likely to prove useful in helping to ensure the continuation of funding for the management and restoration of the heritage resource in National Parks. The methodology could also be adapted to encompass the various community-based assets that contribute to the economy and capital of National Park communities, of which heritage plays a significant part. There is also a

need to identify the beneficiaries and groups that may be excluded from positive impacts. Furthermore, longer term studies of the sustainability and development of positive economic impacts are required, perhaps building on Hyde and Midmore's (2006) and Council for National Parks (2006) methodologies with a longitudinal element.

In terms of economic modelling there is certainly a role for heritage to be incorporated into accounting for the potential environmental costs and benefits of economic and planning decisions, particularly in the context of the evolving climate change agenda and the need to both mitigate, and adapt to, impacts of climate change on the heritage resource in National Parks. While this would require substantial methodological development in itself, adaption of regional and sub-regional SAMs could provide a useful starting point. Such work would be of benefit to park managers and policy makers, not only in helping to account for impacts of planning decisions on the historic environment, and for the benefits of the historic environment to the economy, but also to ensure that the historic environment is not sidelined as a result of the climate change debate, which may favour environmental assets with the ability to offset carbon.

A potentially fruitful area of research would also be to examine the nature and influence of the 'cultural orientation' of market town inhabitants and businesses on the economy of these National Park locales. While previous research has begun to reveal how important small towns in and adjacent to National Parks are to their economy, no research has yet focussed on the distinct role of the historic environment on the functioning of such towns, for example in terms of the production and consumption activities of residents, visitors and businesses. Such research could usefully emulate Courtney et al's (2007a) approach, which focused on the nature and strength of town-hinterland spillovers, but it could also be extended to examine the qualitative determinants of spatial economic behaviours, on the part of both consumers and producers, and of course the distinct role that heritage plays in this process. Findings could play an important role in planning for sustainable local economic development in National Parks, and could have use in spatial planning at the regional and sub-regional level.

Looking more widely at indirect and halo effects, there is increasing emphasis on the importance of quality of location factors in regional development. However, there remains a dearth of information relating to the role of the natural and built heritage in influencing location decisions, among both companies and individuals, to National Parks. Again, capturing the potential halo effects of location decisions to small towns adjacent to Park boundaries could prove particularly fruitful by highlighting the indirect impacts of the historic environment on National Park economies.

2.4 Heritage and tourism

The relationship between heritage and tourism is well documented in all categories of the literature. While heritage can attract visitors to an area, direct and indirect revenue from tourism can also help maintain heritage assets (Courtney et al 2006). The central problem lies in developing a sustainable tourism industry (Breakell, 2000), and in the context of National Parks, the concepts of capacity and zoning are crucial to landscape and habitat conservation, as well as to visitor and heritage management (Travelwatch, 2004).

In addition to the gap analysis, this section of the review is divided into three parts. The first (2.4.1) considers some of the key issues surrounding tourism management in designated landscapes. The second (2.4.2) attempts to set heritage in the context of wider tourism impacts, both economic and social. The final section (2.4.4) examines further the economic evaluation approaches relating to tourism and provides a short critique of the relevant methodologies.

2.4.1 Tourism management in designated landscapes

The National Parks have preserved historic landscapes due to a lack of recent intensive agricultural development, particularly in the uplands. They also have their own culture and traditions and both of these aspects are important for attracting tourists to the Parks, particularly overseas visitors to their areas. The fact that heritage is an important motivator for tourism to, and within, the UK is widely recognized (Nurick, 2000; Prentice et al, 1993; Markwell et al, 1997); it is far more important for the UK tourism industry than for other destinations where sun, sea and sand rank high (Nurick, 2000). In an Overseas Visitor Survey in 1996 overseas leisure visitors ranked the UK's heritage as a high motivator (BTA and ETB, 1997). A recent National Opinion Poll for the National Parks Awareness Survey in 2007 found that the landscape (35%) was what visitors enjoyed most about National Parks, with peace and quiet second (33%) and wildlife third (16%). Visiting attractions were rated at fifth at 11%.

Looking specifically at National Parks, existing research suggests that their heritage landscape and the history and traditions are of particular importance in attracting visitors to these areas. A 2002 survey of public perceptions as to what is valued in the Lake District (Graham, 2002), identified responses that were divided into the perceptions of local groups, domestic visitors and international visitors. International visitors in particular valued the heritage, history and tradition of the region with 75% stating this as one of the reasons for visiting the Lake District. Barr (1997) in the English uplands and Bullen et al (1998) in Gwynedd also identified the important historic nature of field boundaries and archaeological features as contributing to both amenity value and to the public perception of the hills and uplands as a special place.

The Yorkshire Moors and Coast Tourism Partnership found that 60% of visitors to the area had been to the North York Moors National Park (Tourism UK Ltd, 2007). When asked to what extent they associated the North York Moors with heritage, 69% said “very” and 11% considered heritage to be a key aspect of the North York Moors.

In the North West it is recognised that historic sites are a big draw for visitors and that heritage assets have great potential to deliver economic benefits for the region. Heritage tourism makes a significant contribution to the visitor economy, with over two million people visiting heritage sites in 2006 alone (Culture Northwest, 2007). It is estimated that heritage tourism could be worth as much as £3 billion to England's Northwest region annually (English Heritage, 2004b).

According to Copley and Robson (1996), cultural and heritage assets are well suited as tourist attractions. They represent the unique features of a place or region, are experiential and promote tradition, ethnic backgrounds and landscapes. Heritage tourism also provides economic benefits and cultural sustainability to local communities and has become a major growth area in the tourism market (Alzua *et al.*, 1998; Chhabra *et al.*, 2003).

The market for heritage tourism includes those for whom cultural tourism is the principal motivation for their trip, accounting for up to 0.3 million staying visitor trips per annum from within the UK, and surveys suggest that as many as 73% of overseas visitors visit historic buildings during their stay (English Heritage, 2000b). During 2002, of the different categories of ‘heritage’ sites in England, 16.5 million visits were recorded to historic houses, with over 13 million people visiting places of worship, and just over 10 million visiting gardens, many of which have a heritage dimension.

The National Trust (2005) suggests that, while many tourism strategies refer to the importance of natural, cultural and historic assets, the need to protect these assets is not well recognised as a priority, nor is it considered fully in other policy areas, such as transport and land use planning policy. The problem is particularly acute in those areas with outstanding scenic beauty or recreational opportunities and those enjoying good access to tourist-generating regions, such as National Parks.

Over recent years there has also been an increasing trend towards the commodification of heritage, or the culture of consumption (Featherstone, 1990) through tourism activities. Many heritage assets have been transformed into ‘experiences’ that can be marketed, sold and bought. Thus heritage is subjected to a process of transformation by which value is added to the ‘product’ (McManus, 1997). The sustainable development of heritage tourism assets can be achieved through careful management and planning, creative and selective marketing and education and training (ETB & EDG, 1991). Nurick (2000) identifies some principles for the sustainable management of tourism, which include regeneration, conservation, product renewal, income streams, multiple uses and repeat visits.

Heritage landscapes and history and tradition in National Parks are of particular importance in attracting visitors to these areas. Heritage tourism is also regarded as one of the most significant and fastest growing components of tourism. Whilst this growth offers significant economic advantages to local communities which will be discussed in the next section, there is an increasing need to protect these heritage assets through careful management and planning.

2.4.2 Heritage in the context of wider tourism impacts

Economic/ Employment Impacts

The wider economic impacts of tourism in a rural context have been well documented (Mathieson and Wall, 1982; Murphy, 1985; Pearce, 1989; Slee et al 1997; Johnson and Thomas, 1990). English Heritage, in 'Power of Place' (2000b), suggests that the historic environment lies at the heart of England's £22 billion tourism history. The Countryside Agency (1999) estimated that 354,000 jobs in rural areas are supported by visitors, many of whom are attracted by the quality of the historic environment. Similarly, the National Trust (2001) in 'Valuing the Environment' reports found that visitor expenditure leveraged by National Trust operations supported 1260 FTE jobs in the North East region, 1540 FTE jobs in Wales, 7350 FTE jobs in South West region and 2300 FTE jobs in Cumbria.

The economic importance of tourism to National Parks is well recognized. The tourism industry has considerable influence directly and indirectly over the economic well-being of the National Park and its local communities. In Brecon Beacon National Park, for example, recent Scarborough Tourism Economic Activity Monitor (STEAM) figures suggest that tourism is worth over £126 million to the local economy each year, or £4,000 for everyone who lives in the Park (Brecon Beacon NPA, 2006). STEAM Data for the North York Moors National Park estimated that in 2006 the total expenditure of the visitors in the Park was just under £300 million (Council for National Parks, 2006). In the Lake District in 2002, visitors to the Park generated over £534 million in tourism expenditure. The (gross) direct economic impact on the entire Yorkshire and Humber region of spend by visitors to the three National Parks in the region was around £660 million. This expenditure was estimated to support around 12,000 jobs and to generate further indirect economic activity bringing the total impact on the region's output to almost £1 billion annually (Council for National Parks, 2006).

SQW Ltd (2004) estimated the tourism value of Protected Landscapes in the North East of England for ONE North East. Northumberland National Park was one of the five protected landscapes considered. Applying visitor spend figures to visitor numbers resulted in an annual tourism expenditure in the Park of £42.8 million. The Northumberland Coast AONB and surrounding market towns generated the largest income at £72.2 million, followed by the North Pennines AONB at £43.5 million.

The importance of the size of the economic base in relation to National Parks can be seen clearly in Wales. While the Brecon Beacons has the lowest direct employment

of all the National Parks, it has the largest indirect employment within its boundaries. Thus there is a high level of self-sufficiency in the economy of this National Park and much of the money spent on employment stays within the Park. In contrast, the Pembrokeshire Coast National Park has a huge economic impact outside its boundaries because it is mainly a coastal ribbon. Nearly all the indirect employment and indirect incomes generated by the Park environment benefits the rest of the Welsh economy. Employees, goods and services can easily travel in and out of the Park and 5% (£16.2 million) of indirect income occurs outside the Park (Hyde and Midmore, 2006). Equivalent figures are not available for English National Parks.

Jordan and Greenland (2005), who evaluated the economic and environmental impact of Local Heritage Initiatives, found that with smaller heritage projects it was often difficult to quantify the indirect benefits related from increased tourism, such as improved revenue for local pubs, shops and cafes. They suggest that LHI projects contribute to wider cumulative impacts, although they highlight that there is currently no methodology available for attributing cumulative economic impacts to individual activities.

While most studies consider the positive wider economic impacts of tourism, Mathieson and Wall (1982) also identify a number of negative impacts. This includes a danger in some areas of becoming over dependent on tourism for their livelihoods, thus making themselves vulnerable to changes in tourist demands. Tourism can also lead to increased inflation and land values, as is evident by relatively high house prices in National Parks (Land Use Consultants, 2004). Further, low tourism demand in the off-season means that capital investment is not fully used during this period, which can often make tourism a less attractive investment than other sectors of the economy which experience steady production. Finally, tourism development can create a number of other costs on local residents. As visitors increase, so does the demand for basic services such as policing, transportation infrastructure, waste collection and disposal, fire, and health care services. The increased demand for these services will inevitably increase the taxation burden of local communities. Such factors are obviously important considerations for National Park managers and policy makers who may seek to maximise the tourism benefits of National Parks.

2.4.3 Social-cultural impacts of heritage tourism

Much emphasis in the tourism literature has been given to the significance of cultural heritage tourism in terms of its job creation and economic generation. However, there are fewer studies of the social impacts of tourism, in part because they are less easy to measure as they are often composed of intangible factors which are difficult to quantify (Mathieson and Wall, 1982). Thus, methodologies for researching the social impact of tourism are in the early stages of development compared to economic impact studies. However, the literature does suggest that tourism can have substantial socio-cultural impacts on both host communities and

on visitors (Murphy, 1985). As the impact of each of these is different, they will be considered separately.

Impacts on host communities

There are a number of positive social impacts of tourism on host communities, such as improving income, education, employment opportunities (particularly for women) (Crompton and Sanderson, 1990; Urry 1991), and local infrastructure and services (Lankford, 1994; McCool and Martin, 1994; Ross, 1992). Employment opportunities and the presence of visitors also encourage younger people to areas of tourism development (Sharpley, 1994) and curb out-migration of youth and other marginally employed community members, particularly in rural areas (UNESCO, 2007). Also there is evidence that tourism revenue and investment can revitalize traditional building and craft industries (de Kadt, 1979; Brunt and Courtney, 1999; UNESCO, 2007). By bringing in revenue, tourism can strengthen local people's self-respect, values and identity, thereby safeguarding aspects of their intangible heritage and enhancing their development potential (UNESCO, 2007).

Other more negative social impacts on the host community include: social and family values challenged, new economically powerful groups emerging, and cultural practices adapted to suit the needs of tourists (Ap, 1992; Johnson et al, 1994). While overcrowding and congestion are often the most commonly perceived sources of resentment and stress (Brunt and Courtney, 1999; Burns and Holden, 1995, Herbert, 1995), other impacts include possible invasion of privacy, and disruption of local lifestyles (Herbert, 1995). Mathieson and Wall (1982) also suggest that tourism contributes to a perception of an increase in crime, even though crime figures may not always support this. Brunt & Courtney (1999) suggest that to optimize the benefits and minimize problems of tourism the social and cultural impacts should be considered throughout the planning process and in an environmental impact assessment procedure involving local communities.

Whilst there are social benefits to host communities of heritage tourism, the findings suggest that National Park managers and policy-makers need to involve local communities in identifying potential negative social impacts from increased heritage tourism activity.

Impact on visitors

While much research has concentrated on the impact of tourism on host communities, little attention has focused on cultural heritage from a visitor perspective, in terms of identifying individual visitor needs, motivations and in particular, the value sought and gained from visiting heritage attractions (McIntosh, 1999). McIntosh suggests that if the personal value attained from heritage tourism can be understood, then cultural heritage development can be justified beyond that of economic generation to an understanding of how people need heritage to add perspective and meaning to their lives and enhance their well-being.

Indeed, it is widely acknowledged that heritage tourism can have a substantial educational significance to visitors (Hooper-Greenhill 1994; Prentice et al, 1993). Beyond this, however, heritage may have other impacts, such as evoking an emotional experience (Poria et al, 2003) or creating a 'sense of place' whereby people feel a particular attachment to an area (McIntosh, 1999) or connection to ancestors (McCain and Ray, 2003). Additionally, some research suggests that heritage institutions, such as a museum, can be seen as places where people come to understand themselves and their community (Wilkinson, 2006; Uzzell, 1998). A number of commentators suggest that different individuals will perceive and encounter heritage artefacts and spaces in different ways based on their own cultural backgrounds. (Ashworth, 1998, Cheung, 1999).

This suggests an important agenda for National Parks with respect to tourism planning and management, and also implies that both social and economic considerations are needed.

2.4.4 Evaluating the economic value of heritage to tourism

One of the forms of heritage that is often found in National Parks in the UK is industrial heritage; in the form of old mine workings and buildings. The legacy of such industrial activity tends to be areas with high unemployment, depopulation, decaying buildings and scarred landscapes (Jones and Munday, 2001) which can discourage inward investment. However, as Edwards and Llurdés (1996) note, these landscapes have a unique selling point which can attract economic resources to an area.

While the direct employment benefits of industrial heritage tourism are weak, the re-imagining and place promotion prospects are stronger, and can encourage inward investment (Cole, 2004; du Cros et al., 2005). With a projected increase in leisure and tourism, programmes such as the "Copper Kingdom Project" which is exploiting the tourism potential of North West Wales' industrial heritage from the 18th Century copper industry, may provide opportunities for economic development.

But is the cost of restoring and maintaining heritage sites for tourism worthwhile? In order to answer this question, an assessment of the costs and benefits of such programmes must be undertaken. This section outlines and critiques the various methodologies employed to estimate the economic value of heritage to tourism. These methods encompass both market and non-market tourism values of heritage (Everett, 1979; Farber, 1988; Rosenberger and Loomis, 2000; Listokin *et al.*, 2002), visitor use of heritage sites – both fee-paying and non fee-paying (Garrod and Fyall, 2000; Poria *et al.*, 2003) and indirect (or 'halo') effects of heritage on regional and sub-regional economies (Slee *et al.*, 2005). To retain the focus on the socio-economic benefits of heritage in National Parks some of this literature necessarily draws on examples relating to developing countries.

Tourism economic impact studies

In terms of economic valuation, there are two main approaches: economic impact studies and environmental economic techniques.

Economic impact studies

These aim to assess the commercial value of heritage to tourism sites through income generation and job creation (Dutta et al., 2007). There are many estimates on income and employment generation resulting from tourism applying both Keynesian multiplier models and input-output analysis (Archer, 1973; Archer, 1977; Pye and Lin, 1983; Sinclair and Sutcliffe, 1988; Johnson and Thomas, 1990; Donnelly et al., 1998; Eagles et al., 2000). Further studies have investigated the impact of investment in heritage goods on local and sub-regional economies which can have further indirect effects on the local economy through tourism expenditure (ERA, 2004; Gaskell et al., 2005; Courtney et al., 2007a). While such studies can be used to analyse and justify programmes of spending, their use is greatly enhanced if the 'halo' effects of this investment through tourism can also be estimated (Courtney et al 2007). Courtney et al, (2007a) estimated that grant maintained barns and walls may indirectly contribute £2.44m (2004 prices) annually to the local economy through tourism expenditures in the Yorkshire Dales National Park. Although a useful indication of the magnitude of tourism spend attributable to barns and walls in the landscape, the model serves better as an example of what could be estimated if suitable and robust data were collected, rather than as an estimate of local additionality of barns and walls in the YDNP per se. As Courtney et al, (2007a) note, the problem of reconciling the tendency for multi-faceted visits by tourists with an appropriate method of disaggregating specific landscape features from the wider landscape has not yet been reconciled. This would require in-depth primary research in a wider sample of National Parks.

Economic impact studies are often most effective when the investment is imported from outside into a particular economy, such as a tourism setting with visitors from outside the region (Mason, 2005). Also, for industrial heritage tourism the direct economic benefits may be overstated. Dicks (2003, p. 42) argues that industrial heritage brings only limited economic benefits: *"Little employment or local employment is being generated. The vision of turning round the economic fortunes of the Rhondda by heritage and leisure alone has turned out to be a mirage."* It is likely that visits are day visitors with spending limited to frontline businesses such as museums, pubs, restaurants and shops (Hospers, 2002). In such cases this lack of a diverse economic base hinders the multiplier effect (Cole, 2004). Industrial heritage sites have the greatest economic impact when they are located near to other attractions or facilities (Jones and Munday, 2001; Hospers, 2002) and when tourism-related opportunities are linked to their ability to capitalize on the 'catalyst' of the site through cross-sectoral linkages (Burns, 1993). Similarly, a study of 16 secondary museums, historic sites and temples in Hong Kong found that isolation from other attractions, a poor setting or a lack of uniqueness hinder their viability as tourist attractions (McKercher and Ho, 2006).

Environmental economic approaches

Environmental economic techniques aim to assess the non-market benefits of heritage to tourism, both use values (in the form of recreational benefits and the satisfaction from leisure-based activities) and non-use values (existence, bequest and option values). Lindberg et al, (1997) applied a heterogeneous specification of discrete choice modelling that included the effects of individual and situational characteristics in choice probability. A study by Huybers and Bennett (2000) investigated tourists' holiday destination choices by the use of personal characteristics to explain their preferences. The results suggested that individuals' cultural differences may explain their preferences (see also Steenkamp (2001)). Poon (1993) argues that the travel and tourism market has become increasingly segmented along demographic, socioeconomic and psychographic lines, including tourists' motivations and opinions. These attitudes are likely to be influenced by nationality, age, culture, background and gender (Poon, 1993). Of the studies included in Appendix 1 of the Technical Annexe, 25 are directly related to tourism.

In their study examining tourists' preferences for two Greek heritage attractions (Knossos Palace and Heraklion Archaeological Museum), Apostolakis and Jaffry (2005) used a choice modelling approach. The results of the study indicated that visitors prefer to visit heritage attractions that add to their understanding of the site and culture, but that do not degrade the integrity or authenticity of the site. Interestingly, the perceptions of visitors are often quite different from heritage managers, with tourists in this study perceiving Knossos Palace and the Heraklion Archaeological Museum as similar attractions, whereas curators of the site perceive them as very different and unique heritage resources. A study of heritage sites in Armenia found significant use values associated with four study monuments (Alberini and Longo, 2006). Domestic visitors indicated that they value conservation programmes and would prefer easier access to the monuments. For the average visitor it would take an increase in price of 3,000AMD to see a decrease by one visit per year. Morimoto (2005) used conjoint analysis to estimate tourism resources and to predict the response of tourists to identify new potential tourist destinations in Luang Prabang, Laos. Of the existing tourist resources, Pak Ou Caves and Sae Falls had the highest tourism values. New tourism resources, such as trekking or visiting artisan villages, were not valued any higher than existing resources. Other tourism resource studies have applied conjoint analysis to hotel amenities (Goldberg *et al.*, 1984; Bauer *et al.*, 1999), ski resorts (Carmichael, 1992) and hunting (Gan and Luzar., 1993).

A study by Kim et al. (2007) investigated whether World Cultural Heritage Site designation leads to increased visitor numbers and financial support, by using a CV approach for Changdeok Palace in Korea. The Palace charges \$2.30 in entrance fees, but the building, facilities and interpretation services are deteriorating, due to a lack of funds. Options for management include either increasing the entrance fee or establishing a management fund. In order to ascertain the best approach, it was necessary to identify the use value of the site for tourists. The study showed that mean values were 2.5 times higher than current admission prices, indicating that

increasing entrance fees would not deter most tourists from visiting the site. Buckley (2004) found that World Heritage listing increases visitor numbers to Australian National Parks. Although designation is not intended as a tourism marketing tool, it may act as a branding for visitors and is used by tour operators for advertising (Buckley, 2004). While there is no proven relationship between World Heritage listing and tourism in the UK, this is most likely because this has not been investigated. In the US, the total economic benefit of the Grand Canyon to the surrounding region is estimated at \$350-\$700 million per year, with World Heritage designation contributing to that value (Buckley, 2004).

Critique of economic evaluations of the contribution of heritage to tourism

Richards (1996) suggests that market saturation has occurred with the supply of heritage resources outstripping demand, so there is increasing competition for heritage sites to attract visitors. Thus, there is a growing need to carefully market heritage resources, both maintaining and enhancing the particular uniqueness of the heritage asset, while also providing a fulfilling tourist experience (Apostolakis and Jaffry, 2005). In this regard, a number of studies are calling for policy makers to focus more on visitors' needs and their requirements, rather than just the heritage asset itself (Richards, 1996; Prentice, 2001). In other words, they are suggesting that heritage management decisions should be directed away from a product-oriented approach to a more customer-oriented approach (McIntosh, 1999; Apostolakis and Jaffry, 2005).

While there has been some quantitative studies on heritage tourists to determine the demand and behavioural structure of such demand (Light and Prentice, 1994; Richards, 1996; Alzua *et al.*, 1998), there is a gap in the literature relating to the nature, extent and potential of the heritage tourism market. Since most cultural heritage tourism goods remain product-led, research has tended to emphasize the effects on job creation and economic generation (Edwards and Llurdés, 1996), management through preservation (Alfrey and Putnam, 1992) or interpretation (Uzzell, 1989; Light, 1995). As was noted previously in this section, there is little attention in the literature on cultural heritage from the tourists' perspective. Poria *et al.* (2006, p. 162) assert that *"very little research considers the relationship between the tourist and the space visited."* What are visitors' needs, motivations and values? Why do people prefer one site to another (Kaplan and Kaplan, 1982)? According to McArthur and Hall (1996), the perspective of the visitor is essential to help heritage attractions survive in an increasingly competitive and saturated market-place. Studies which explore the "experiential" nature of heritage tourism are required alongside economic valuation and preservation of the resource. While some studies have attempted to address these issues (Prentice *et al.*, 1993; Beeho and Prentice, 1995; Beeho and Prentice, 1997; Prentice *et al.*, 1998), there is a need for a wider range of studies that focus on the individual consumer of heritage (McIntosh, 1999).

However, there is a balance between maintaining the optimal number of visitors to a site in order to provide income for its maintenance and conservation, and over-use

of the site which leads to degradation of the heritage resource and deterioration of visitor experience (Shackley, 1998). In economic terms, heritage assets may in effect be best managed as “club goods”, where there is a degree of excludability (through the implementation of entrance fees, limits on numbers etc.), but the visitor experience is not diminished due to rivalry of consumption. It is clear that visitors can have both a positive impact (tourist revenues) on heritage sites, but also a negative impact (excessive pressure). Mourato *et al.* (2004) also discuss the implications of World Heritage designation on heritage sites. By their nature, these sites are costly to maintain and while it is tempting to increase visitor numbers in order to increase revenue, this puts further pressure on the site. Mechanisms such as entrance fees can be used to raise funds for conservation of the site, while at the same time limiting numbers. Although there are issues surrounding increasing entrance fees in terms of providing “access for all”, Mourato *et al.* (2004) argue that whether keeping entrances fees low widens access is debatable. They suggest that this may simply subsidize wealthy overseas tourists or encourage repeat visits, as opposed to persuading less privileged individuals to visit.

Obviously managing heritage resources is a balance between providing access, conserving the site and financial sustainability. Mourato *et al.* (2004) discuss two approaches for managing heritage sites, each with different objectives and outcomes. Under a profit maximisation regime, the entry price is selected to maximize profits. However, as indicated above, such an approach may exclude certain groups from visiting the site. In such cases, profit maximisation with price differentiation might be appropriate, where different prices are charged for different groups (such as reductions for senior citizens, children and students or in developing countries, resident rates and tourist rates). Alternatively, a pricing regime that aims to maximize social welfare might be desired if the objective is to encourage domestic tourism. In this instance, foreign visitors would be charged profit maximizing prices, whereas domestic prices would be set at the price which maximizes consumer surplus (while ensuring that the site does not make a loss). In their study investigating the value of visiting the Machu Picchu Citadel and Inca Trail in Peru, Mourato *et al.* (2004) suggest that profits could be increased over three-fold for the Citadel and over 15 times for the Inca Trail by increasing the entry fees. A strategy of profit maximisation with price differentiation would produce \$3.5 million per year and a maximizing social welfare strategy would provide \$2.9 million.

These economic valuation techniques can clearly inform policy makers where to establish new tourism resources and the costs and benefits of such activities. Often heritage resources are conserved on a self-financing basis through their development as visitor attractions. Through economic valuation the potential revenue generating capacity from heritage tourism can be estimated (Dutta *et al.*, 2007). Within the National Parks of Britain, both economic impact studies and environmental economic techniques are useful in assessing the economic contribution of heritage to tourism. Economic impact studies can estimate the multiplier effects of investment and help to identify those heritage sites that provide the greatest economic benefits. Environmental economic approaches provide a

further valuation of the non-use values of heritage assets in National Parks, identifying public preferences and values for such attractions. Such approaches can be employed in order to inform decision-making for investment and management of heritage within National Parks.

2.4.5 Research Gaps: Tourism

The research methodologies for measuring the economic impact of heritage tourism are well established. However, one evident gap in economic impact research identified by Jordan and Greenland (2005) is the development of methodologies to measure the economic impact of individual initiatives that have an obvious cumulative impact. Where, for example, the development of a number of small projects contributes to the local economic base and together increase visitor numbers to National Parks.

While there are many studies which have explored the economic impact of tourism in National Parks, few studies have looked specifically at the social impacts of tourism and methodologies are still in an early stage of development. In particular, there is a paucity of research into the impact of National Park heritage on visitor needs and motivations. Poiria et al (2006) suggest that research is required which explores whether the relationship between the individual and destination is essential in understanding tourist behaviour.

Further, while much is known about visitors' perceptions of the landscape and scenic quality of National Parks, little is known about their appreciation of the heritage assets within these designated areas. For example, little is known about the importance that visitors place on the traditional farm buildings or stone walls that make up this landscape, or on facets of industrial heritage which not only help to make up the landscape but also the history and culture of National Parks. Visitor research, which specifically identifies the importance of heritage assets in National Parks to the tourist, would be valuable. This is considered further in the following section.

Britain's National Parks contain a range of heritage attractions including Stone and Bronze Age remains, Roman forts, castles, stately homes, historic landscapes and the remains of former industrial activity. As has been identified in this review, the literature on what makes heritage attractions successful is limited (McKercher and Ho, 2006). Therefore, a strategic assessment of heritage resources is required, analysing their potential to contribute to local economies through tourism expenditure and identifying priorities for investment. In this regard, a structured programme of study is recommended to assess the opportunities for the development of heritage tourism. Such an assessment would need to take account of the fact that the majority of heritage sites in National Parks are non-fee paying, and that heritage features in the landscape may influence tourism expenditures indirectly, and will necessarily require a form of expenditure partition for heritage assets to be developed. Good starting points to inform this work would be a study

which seeks to qualitatively map heritage understanding by visitors to National Parks and the assembly of baseline visitor data for both fee-paying and non-fee-paying heritage sites in National Parks, which it may be possible to draw in the first instance from National Park management plans.

This section of the review has also identified a need for more consumer-based research. In this regard, an assessment of public preferences through an estimation of the non-market benefits of heritage to tourism is required. Using stated preference techniques (such as choice experiment or CV Market Stall); the non-use (bequest, option, existence) values of heritage can be estimated. This will allow those heritage assets that are most valued by the public to be prioritized for investment.

Secondly, the development of an economic impact model is needed to identify heritage assets that provide the best opportunities for investment in terms of their potential returns for the tourism economy of National Parks. The model needs to account for the spatial location (remote, accessible) of heritage attractions, its proximity to other attractions and linkages with other aspects of the local economy (shops, businesses, hotels etc.). The Tourism Council of Australia (1998) assert that the location, access to the marketplace/consumer and the ability to identify the unique features of heritage assets are key. Remote, isolated attractions find it hard to attract visitors. The use of both economic impact studies and environmental economic approaches will allow for an assessment based on consumer demand and economic viability to be made. If a heritage attraction is shown to provide large benefits to the local economy and also has high non-use values, the case for investment and development as a tourism resource is high.

Thirdly, contingent valuation techniques can be used, where appropriate, to identify optimal pricing strategies for heritage attractions to ensure that a balance is struck between accessibility and conservation of the site. This will enable a pricing structure to be set that will not deter most tourists from visiting, but will ensure maximum profits for protection and maintenance of the site.

Finally, the development of benefit transfer approaches to assess and identify heritage assets for investment would clearly be appropriate. Both economic impact studies and environmental economic methods are time consuming and costly to apply. Benefit transfer would allow for the benefits of an unsurveyed site to be estimated by comparing to a similar surveyed site. In order to establish a benefit transfer model, a conceptual framework for the evaluation of the economic costs and benefits of heritage in National Parks is required.

In summary, the main areas for future heritage tourism research are:

- Estimate the demand level and public preferences for heritage through an assessment of non-use values using stated preference methods (choice modelling/CV Market Stall)

- Development of an economic impact model to assess the economic viability of heritage attractions in National Parks;
- Identify optimal pricing strategies using contingent valuation;
- Development of benefit transfer approaches to identify and prioritize heritage attractions for investment.

The review has also highlighted the importance of assessing the relationship between tourists and destinations, including the perceptions and values of heritage from a visitor perspective. Reconciling this with the understanding of heritage by stakeholders, Park managers and local communities will enable a more holistic and effective management of the tourism resource in National Parks.

3. Findings of the stakeholder consultation

This section presents the findings from the four forms of stakeholder consultation undertaken in the study: an email survey, telephone interviews, face-to-face interviews and participatory workshops. It comprises entirely of reportage from the various consultations which has not been moderated by the authors. Further information about the aims and methods of each is provided in section 1.2. Findings are presented under three headings: The main issues (Section 3.1), which draws on a synthesis of findings from the email survey and telephone interviews; Building on The public value approach (Section 3.2), which presents findings from the face-to-face interviews; and Identifying research priorities (Section 3.3), which draws principally on the findings from the participatory workshops but incorporates some of the generic findings from the other three forms of stakeholder consultation.

3.1 The main issues

This section draws together findings from the email survey and telephone interviews.

3.1.1 Key elements of heritage associated with National Parks

National Parks (NPs) and the heritage they contain are considered by stakeholders to be complex entities generated by multiple processes involving a host of forces, demands and priorities. There is therefore a need to think about heritage in the context of NP purposes in the round. Many respondents also preferred to embrace a wide interpretation of heritage (which is broadly consistent with the inclusive definition of heritage put forward in section 2.1), including working with communities, tourism/visitors, other stakeholders, and policies relating to heritage. Similarly, they considered that elements *within* the heritage of NPs should not be separated out. However, as the definition set out in section 2.1 also recognises, the heritage of NPs often does take the form of tangible physical features, whether existing buildings, archaeological sites/remains, industrial remains, cultural or natural landscape features.

Buildings are critical components of heritage as settlements, farmsteads and individual buildings set in landscapes; their vernacular form and materials are a key aspect of heritage and identity. They have a depth of association with the landscape through layers of history, which helps form the distinctive heritage of a NP. While it is vital to find new uses for historic buildings in the context of shifting agricultural, economic and social trends, this needs to be considered in the context of ensuring appropriate levels of heritage skills, conservation regulation, and funding. Landscape is also a key component of NP heritage, varying from near wilderness through to intensively farmed areas, with degrees of semi-naturalness and extensive farmed areas between. Farming/landowner stakeholders stressed that farming and other private land use practices are vital contributors to, and part of, heritage. Farming,

particularly traditional farming, maintains the landscape visually and in terms of aspects of ecology, but also forms a key part of landscape character.

Beyond the tangible elements of buildings, settlements and landscape are the less tangible, cultural, elements of NPs which range from high art renditions of famous landscapes to more local cultures of place names, accents, songs, recipes, food traditions, local legends and so forth. Respondents perceived interdependency and mutual enhancement between material and less tangible heritage. Specifically, NP authorities were thought to be very good at recognising the importance of key rural skills in forming 'links' between material and less tangible NP heritage.

Stakeholders were asked whether they perceived cultural heritage to be more evident in NPs than other areas. Responses varied considerably, with some people feeling that the status of National Park bestows extra resonance to the parks' heritage elements:

Because of the resources, management and administration systems of NPAs and some of the planning powers they have, it is often easier for them to be able to make greater strategic use of the cultural asset in a more holistic way. Promotion of events and occasions is easier due to the park having a distinct identity which is closely linked to all the features that resulted in them being designated. The associations between cultural events and the features within NPs are often easier to establish, maintain and celebrate than in other areas (CPRE).

Others found this question more difficult to answer. They stressed the difficulty of generalising and the arbitrariness of the notion of a fixed boundary and thought that contiguous areas might share much of the heritage of NPs. This attitude applied particularly in Wales:

The identity of cultural heritage in the areas that have been defined as NPs is necessarily the most important representation of the cultural heritage in Wales but there are areas outside NPs which have equally good if not better representations of the diversity of Welsh culture... Cultural heritage of NPs is important but the integrity and identity limits of that naturally flow back and forwards across an artificial boundary which is called a NP boundary (CPRW).

One respondent suggested that this question was at the very heart of heritage landscapes, NPs, and how they are valued, and should be a theme of the present report.

3.1.2 Perceived benefits of heritage in National Parks

Heritage underpins the whole ethos and attractiveness of NPs. While in some respects it can threaten to prevent socio-economic development, the benefits of protected heritage are thought by stakeholders to outweigh any potential

disadvantages. Beyond the 'bottom line' of heritage forming the bedrock of NPs, three more specific types of benefit were identified.

- Heritage is the focus of the tourist experience in NPs and this in turn plays a vital part in local economies;
- Heritage is a key component of the sense of place of NPs.;
- Heritage provides a number of services to society: supporting well-being, health and recreation, as a learning resource, as a setting/resource for creative industries, and for marketing local goods and foods. Eco-system services, which heritage features can also provide, offer benefits through, for example, forestry catchments and flood alleviation.

3.1.3 Priorities for policy makers

Stakeholders were asked what should be the priorities for policy makers in English and Welsh National Parks over the next five years. Responses fell into five main groups: recognising the importance and value of the historic environment, ensuring the policy framework delivers sufficient protection, ensuring the availability of sufficient funding, public awareness of heritage issues, and full access to the heritage resource. These are addressed in turn.

1 Recognising the importance and value of heritage and the historic environment

There was a perceived need to foster the importance and value of heritage in NPs throughout society. This would entail developing the profile of heritage in sectors ranging across education, training, public opinion and industry, and in governance networks. It would need to be set in the context of recent reports into the poor provision of heritage skills nationwide; for example, of the 109,000 people employed on pre 1919 buildings in 2007, only 33,000 were equipped with skills in traditional building materials (National Heritage Training Group, 2008).

Respondents felt there was a need to:

- ensure that heritage has a strong voice where it matters. It is vital to argue that a vibrant natural and cultural heritage helps underpin, for example, well being and economy;
- raise the educational profile of cultural heritage as this can influence developments such as post-school training and public awareness of the need to fund heritage;
- provide training in skills to support the heritage fabric at appropriate prices;
- work with the heritage governance community and private construction sector at local, regional and national levels;
- introduce new means to interpret the historic environment and develop curatorial skills alongside heritage management and conservation skills;
- address the relationship between NP terrestrial areas and adjoining coast/marine areas;

- emphasise that the NP heritage forms a significant part of the overall national stock of heritage assets;
- recognise the importance of cultural heritage alongside that of natural heritage.

Additionally, some respondents to the email survey emphasised that heritage conservation is as important as nature conservation but requires targeted support as it is not treated equitably in terms of funding.

2 Ensuring the policy framework delivers sufficient protection

Stakeholders emphasised the need for heritage protection through policy frameworks at all spatial levels, several stressing the point that the aim of policy should be to maintain the character for which NPs were originally designated. There is a growing recognition that heritage can reach across all political agendas (e.g. social inclusion, well-being and regeneration) but climate change was singled out as a particular concern. Policies must be in place to support both climate change mitigation and adaptation, although mitigation measures do not necessarily fit well with established protection priorities. Alongside climate change five further areas were identified where policies need to be developed.

Agriculture /ecology

Concerns were expressed amongst ecology/nature conservation stakeholders that policies are not flexible enough to support the needs of ecology:

Good agricultural and environmental condition precludes scrub and natural regeneration on farmland and in terms of creating interesting and exciting habitats and whole landscapes these gradations of habitat are needed; from pasture through to low scrub and into full woodlands (Woodland Trust).

Concerns were also raised about the impacts on NP heritage of CAP reform and changing agricultural funding, about the need to invest in land managers, and food 'insecurity'.

Heritage/landscape

Some respondents claimed that policy often concentrates on what is already protected; frameworks need to be adjusted to ensure that attention is paid to *overall* heritage and to treat it in context rather than in isolation. Policies need to take account of the aspirations of NP populations and manage change accordingly:

People have to live in NPs and these are usually in rural areas. It is much easier for people to adapt to change in urban settings in terms of the environment changing around them. In rural areas it can have a profound effect if there is an attitude of 'no more development' even if associated with the conservation of a building and bringing it back to a new use. NPs need to become more 'living, breathing areas' not just being preserved in aspic. An enabling attitude is required (Assoc of Preservation Trusts).

Specifically, there should be a link with emerging national policies such as the new Draft Heritage Protection Bill and with wider policy debates on, for example, the hidden costs of maintaining the countryside.

Environment

Links need to be made between NP heritage and national policy frameworks and directives, such as the water framework directive, initiatives on soil and nutrient management on farmland, UK Biodiversity Action Plans, and changes to Tree Preservation Orders.

Social

NPs present a complex, shifting and in some ways 'conflicting' set of social demands in terms of how they and their heritage are managed and it was stressed that policies need to respond accordingly. Stakeholders who felt that their aspirations for NPs were under-represented commented extensively on this issue:

There is a mismatch between the aspirations of those wanting to live within an attractive countryside in NPs and the people trying to get an income out of NPs, the latter striving to sustain businesses that help to maintain the countryside. This has an impact on the heritage of NPs. Many government agencies refer to stone walls, habitats and landscapes in isolation of the land management practices that result in those features. Schemes are focused on these outcomes which are seen as good but priority needs to be given to farming practices (e.g.: uplands). However the government does not want to be seen to be supporting farming rather it focuses on the outcomes described above (NFU).

Buildings and planning

Many respondents commented on buildings and planning issues in NPs, focusing on redundant and empty buildings, and expressing strong, differing opinions:

"A priority, particularly given the strong presumption against development in NPs, is that redundant buildings, particularly agricultural buildings, should be converted to new uses wherever that is not totally incompatible with other historic significance. In some cases that will mean residential uses but probably the preference is for employment uses, or in some cases, affordable housing because these are solving the main problems in NPs" (CLA).

A key barrier was seen to be 'heritage consent'. While English Heritage has issued helpful new guidelines on the conversion of traditional agricultural buildings, they do not go far enough and take time to work through the system. Dealing with heritage needs to be embedded in Local Development Frameworks in ways sensitive to heritage, users, communities, visitors and the wider landscape. Gaining acceptance of appropriate change of use was seen as a key way forward; it should not be something that is unacceptable as a matter of principle. Currently, any development that generates car movement, including the conversion of buildings to new uses, is increasingly being seen as unacceptable and the more climate change takes priority,

the more this will be a problem. A balance should be struck with other needs in remote areas where other kinds of travel are highly problematic.

Conversion costs are also seen as a barrier to the effective use of buildings. Private stakeholders need to be as certain as possible that conversion will produce an income; this can be a major issue for farmers. Even if conversion seems financially viable, they might have problems borrowing the money and even if they secure the capital they might not be able to let at the end. It seems likely that the prospect of 'Empty Business Rates', starting from April 2008, will discourage many conversions.

Finally, one respondent pointed out that having policies in place must be supported by effective local means of delivery, often involving partnership, enablement and stewardship.

3 Ensuring the availability of sufficient funding

The availability of appropriate funding for NP heritage was considered to be fundamental, but there are challenges relating to (1) the strategic, political and cultural framework for funding, and (2) differing aspects of specific funding and associated mechanisms.

In the first category it was thought that new financial measures were required to ensure the sustainability of NPs in shifting economic/policy contexts. In particular the threat of climate change and the withdrawal of agriculture from economically marginal farm land expose NP heritage to considerable risks; this needs to be considered in NP governance at regional, national and EU levels. In this regard it was felt dangerous to make sharp distinctions between natural and built heritage; the importance currently placed on natural heritage can distort funding and outcomes with respect to heritage, a particularly important issue in terms of EU funding.

There were also concerns about the 'culture of conservation' in relation to funding, particularly for listed buildings. If conservation demands are too stringent then funding becomes problematic; a more sympathetic approach was called for. It was also suggested that if heritage is really important then funding could come from central government as National Park Authority (NPA) funds/grants are not always enough to ensure appropriate conservation.

The interviews yielded a number of brief summary statements which were, by and large, reflected in the results of the email survey. These can be summarized as follows:

- NP policy objectives must be supported by appropriate levels and forms of funding;
- state and public funding will play a central role, but funding from the private and voluntary sector will also be needed;
- NPs must retain their physical and legal integrity but NPAs must foster good relationships with as wide a network of agencies and stakeholders as possible;

- appropriate funding relies on appropriate financial and administrative infrastructure;
- NP heritage, and the socio-economic benefit it engenders, must attract appropriate levels of national political support because funding depends on political will;
- heritage assets, and the funding they attract, must be maximised by best practice and adding value;
- new ways to justify public expenditure in protected landscapes should be developed;
- the priority of heritage must be maintained in the light of competing demands for funding within and outside NPs.

The second category of funding issues concerned the effective delivery of heritage funding. It was felt that how land managers and/or farmers are paid for managing environmental assets or delivering environmental public goods in NPs needs specific consideration at national and EU levels. It was also suggested that more heritage/conservation professionals need to be employed in NPAs and that this would require adequate funding. The provision of grants for heritage-related work funded by a NP admission charge, by levies on visitor attractions, or by local or national taxes should be investigated.

Respondents reported a particular problem with the maintenance of ‘unusable’ structures that do not generate income. Although farmers might like to undertake this work, they have neither the time nor skills and cannot afford to employ someone to do it without subsidy. There are opportunities within the environmental stewardship scheme, Entry Level Stewardship (ELS) and Higher Level Stewardship (HLS) to help in this respect, but they might well prove insufficient.

4 Public awareness of heritage issues

Two important concepts were discussed in the context of public awareness: ‘stewardship’ and ‘connectivity’. Stewardship incorporates notions of shared ownership, nurturing and empowering in which NP heritage is seen not as a set of fixed and narrowly owned assets but rather as a ‘collective’ in terms of stakeholder elements and practices. Further, if stewardship is to deliver sustainability it must broaden the interpretation of what heritage character is, and develop an approach which sustains the whole character of a place.

The concept of connectivity relates closely to that of stewardship encompassing, for example, connections between natural and cultural heritage; between policy objectives and appropriate funding; and between tangible and less tangible heritage. Respondents felt that structures and features are important in their own right but become even more important when coupled with an understanding of the context in which they sit. Sensitive appreciation of the connections between historical features in the landscape will enable those features and their broader context to be managed through stewardship in an integrated way. In this regard NPAs need to be less

bureaucratic - and more flexible and creative - in the way they help to foster stewardship in local communities.

Particular points relating to public awareness emerged from the email survey:

- the value placed on the historic environment by local people should be reflected in the importance placed on it by the NPA;
- the need to harness innovative partnerships that enable funding and expertise;
- the need to engage with ethnic groups/young people and fund projects to encourage access and interest;
- the problem of loss of local identity and knowledge through an ageing population and fragmented local community.

5 Full access to the heritage resource

The twin aims of conservation and access have been at the heart of the NP movement since its inception. This has caused a certain amount of tension particularly in the conservation of fragile natural heritage and, to some extent, for cultural heritage features. Respondents felt that the most important thing was that access is designed, enabled and promoted to as wide a population as possible. Every effort must be made to exploit NP heritage in a way that breaks out of this class/affluence 'trap':

Many volunteers have ability to engage with young people and policy makers must realise that they can lighten up a little bit and it's not all about walking around in an orderly fashion in a stuffy stately home, far from it, the history and heritage of this country should be for everybody.....If they feel involved they are more likely to tell their friends and then go back themselves (YHA).

3.1.4 Priorities for Park managers

The priorities that stakeholders thought NP managers should address inevitably echo the dual aims of conservation and access, but these are now interpreted in the context of a wider notion of sustainable development encompassing social, natural and cultural heritage matters. The priorities identified are set out under three headings: caring for assets, managing the impact of visitors, and sustaining communities.

Caring for assets

A wide range of issues relating to caring for assets was thought to be important, often reflecting the interests of particular stakeholders:

- prioritising, maintaining and enhancing landscape character as an asset;
- maintaining local food networks;
- maintaining the quality of natural resources in their own right and in relation to wider society benefits;
- maintaining the rural landscape as a farmed landscape;
- protecting the locally distinctive ways in which farmers manage their land.

The possibly conflicting priorities which stem from the need to protect, but also benefit from, heritage assets emerged in the email survey. There it was stressed that heritage assets need protection from increased usage – and there is thus a need for sustainable tourism strategies. At the same time, though, there was concern that social change is leading to less interest in heritage and that this might have an impact on the diversity and numbers of visitors, and might undermine funding for the sustainable management of heritage assets.

Managing the impact of visitors

In terms of managing visitor impacts, respondents felt that:

- the importance of natural heritage *per se* needs to be stressed as one of the wider issues surrounding tourism and recreation based on natural assets;
- baseline data need to be in place to underpin the assessment and management of visitor impact.

Sustaining communities

Sustainable development rests upon the interplay of social, economic and environmental elements, so the sustainability of communities must be part of the mix:

National Parks are often remote and sparsely populated areas so anything that can help local communities survive economically whilst also delivering heritage benefits is clearly very important. (CNP)

Efforts must be made to maximise the social and economic benefits of heritage and to raise awareness of heritage amongst resident, visitors and others, identifying ‘new audiences’ *within* those groupings. Work needs to be done to help communities engage with local heritage – e.g. through volunteering, community ownership schemes, or education. Engagement with heritage could be part of the development of community cohesion but is easier where there are tangible heritage assets. NPs also have an important role to play in helping people understand and appreciate the quality of natural environment particularly, for example, in the context of climate change.

Finally, sustaining communities - and the NPs themselves - will involve dealing with intangible yet highly important matters:

The less tangible elements such as community cohesion and local distinctiveness are considered important but they are harder to measure and they influence the Treasury less. In the long and very long term I think they are very important but in the short term they don't appear important especially in economic terms. The more tangible they can be made the better and the more seriously they will be taken. Anything that can be done to demonstrate their importance is likely to be valuable. (CLA)

Findings from the email survey and telephone interviews have shown there to be a wide variety of perceptions and viewpoints regarding the socio-economic benefits of heritage in National Parks. Stakeholders consider National Parks and the heritage they contain to be complex entities generated by multiple processes involving a host of forces, demands and priorities, and as such a number of priorities for policy makers and park managers are highlighted. These include ensuring that heritage has a strong voice and profile in National Parks, which is supported by appropriate levels of funding and the fostering of public awareness. Building on these wider agendas, the stakeholder consultation went on to drill down further into the benefits of heritage resources in National Parks, and in turn the research needed to inform the exploration and quantification of such benefits. This included consultation focusing on the Public Value approach, findings from which are reported in the following section.

3.2 Building on the Public Value approach

One objective of the study was to build on existing knowledge around the Public Value (PV) approach in the context of the socio-economic benefits of heritage in National Parks. In accordance with this, and building on the earlier discussion of the PV approach in section 2.2.1, the following section presents the findings from in-depth interviews which sought to gain stakeholder views, perceptions and experiences of the PV approach in relation to National Park management, heritage management and policy and the socio-economic benefits of heritage in National Parks.

As described in section 1.2, the face-to-face interviews focused on how the three types of value recognised by the PV approach (Intrinsic, Instrumental and Institutional) can produce socio-economic benefits within National Parks. In addition to some questions on research needs (which are dealt with in the following section), the interviews were structured around five themes:

1. The value(s) of heritage within National Parks;
2. The Public Value approach;
3. Maximising the socio-economic benefits of heritage;
4. Applying the PV approach in heritage management and policy;

3.2.1 Values of heritage within National Parks

The interviews initially sought to establish how stakeholders perceived the value of heritage in National Parks, with opinions divided into four main areas.

National Parks as special places

It was clear from the interviews that National Parks are seen as special places characterised by some of the nation's most dramatic landscapes. While a high degree of openness and a lack of urban development was a common feature across all the Parks, each Park was seen to have its own distinct identity. Statutory designation as National Parks has set these areas apart from the rest of the countryside and has helped to provide them with a national prominence within society. National Parks made an important contribution to social well-being and were seen as places where people could 'renew' themselves and make connections with the environment (including nature and culture). Highly valued landscapes are the key asset that distinguishes National Parks from other areas. It was heritage expressed at a landscape scale, rather than in individual features, that made National Parks stand out from many other areas.

Many of these highly valued landscapes are also extremely fragile. A range of social, economic, political and environmental drivers meant that significant change was inevitable. The processes involved in the creation and management of these landscapes, particularly agriculture, were seen to be key to the future of the parks. Heritage protection and enhancement were seen to be very important functions of National Park Authorities (NPAs) but it was also noted that the parks were living landscapes that needed to evolve. Managing this evolution was seen as a major challenge and a key feature of this was the retention and development of the skills and knowledge base. It was also noted that there would be some changes that could not be managed effectively and ways needed to be found to accommodate such change.

Another major challenge is the widely held perception, among the 'general population', that National Parks are unchanging places and that the status quo should prevail when development issues are discussed. It was suggested that the landscapes of National Parks have become disconnected from the processes that created them and that NPAs have a major part to play in making the re-connections based around the concept of the living landscape. The NPAs also have a role in helping people, both residents and visitors alike, to develop their understanding of the landscape. Here there are opportunities to engage with people in different ways and from different perspectives. Reciprocal learning was mentioned as an important process and that there can be multiple interpretations of the past, which may lead to different sets of values. A major challenge for heritage organisations was to recognise and accommodate different sets of values, particularly those that were in conflict with one another.

Changing heritage value(s)

The issue of changing heritage values was raised by a number of interviewees. It was suggested that it would be wrong to see the heritage value of National Parks as being fixed and one-dimensional. It was multi-layered, changed through time and across society. The heritage value of National Parks could not be assumed to be exactly the same as it was when the concept of National Parks was being developed in the early

part of the 20th Century. It was mentioned that there is now an increased awareness, across government and its agencies and among professional and voluntary organisations, of the cultural value of national parks. A number of dualisms were mentioned by the interviewees, which were related to variations in the meaning of heritage to different groups, these included visitors and residents, experts and 'ordinary' people and farmers and non-farmers.

Heritage as a process

Heritage as a process was discussed by a number of interviewees. It was suggested that it is important to understand the process by which places obtain their value as heritage. By conceptualising heritage as a process attention was focused on the ways in which heritage values are formed and re-formed by different individuals and groups. This helps to break down long established notions of heritage, which tend to dominate in National Parks but may not resonate across all sectors of society. One interviewee questioned whether it was appropriate to continue emphasising the natural beauty of National Parks, based on an outmoded concept of naturalness, when they were increasingly recognised as cultural landscapes. It was suggested that heritage is bound together and that cultural and natural heritage are indistinguishable.

Heritage as one of many values

There is often conflict between different sets of values and a key function for NPAs is to manage these conflicts where possible. There is nothing innately wrong about contested values and the key to devising satisfactory outcomes is openness and reflection.

It was suggested that there might be a danger in separating out heritage value from the range of other values associated within National Parks. Could heritage and its associated socio-economic benefits be distinguished as a separate category? While this may be the case for professionals, do other groups such as visitors and land managers think in this way?

3.2.2 The Public Value (PV) approach

Within this area of questioning stakeholders were asked how they identified with the three sets of values of the PV approach, and how these aspects manifest themselves in heritage policy and their work. Discussions around this theme elicited a range of responses and showed that, in terms of their own organisations, there were varying degrees of engagement with the PV approach. For some, the conceptual framework provided by the PV approach was seen to be useful and of practical help in dealing with heritage issues in their day-to-day activities. For others, the PV approach was seen to be of little help and rather artificial in its construction. All the interviewees were aware of the PV approach and this awareness had been gained largely through their professional development rather than through their day to day activities. There was little difference in awareness between National Park and non-National Park

stakeholders. The PV approach is still relatively new and is not been explicitly used in National Park management plans and cultural and historic environment strategies.

Identifying with the three sets of values of the PV approach

For one interviewee the most important achievement of the PV approach was to place members of the general public at the centre of the heritage process where before they had often remained on the periphery, as their views were seen to be less important by decision makers than those of heritage professionals. The PV approach was seen to provide a more sophisticated approach than cost benefit analysis in situations, such as with heritage, where it was difficult to measure impacts.

It was suggested that while the use of three sets of values may introduce an element of over simplification, the PV approach had focussed attention on the importance of intrinsic values and provided a platform alongside more familiar instrumental values. National Park Authorities are now aware of the importance of fostering the instrumental values of heritage. Through agri-environment schemes farmers are increasingly aware of the values they have on their farms. The institutions have a role in helping land managers and residents realise that what they have is valuable. They also need to make visitors aware of the wide range of heritage values within National Parks, which can be achieved by making connections between National Parks as places and the visitors own life experiences.

It was also stated that the challenges of designing and implementing suitable measures for intrinsic values should not be underestimated and at present the PV approach lacked the necessary degree of refinement to be of widespread practical use. One interviewee noted that the intrinsic value of heritage is often associated with a sense of place and feeling of security. It is this which generates the deepest emotional attachment to an area and the largest feeling of comfort. For the interviewee it is synonymous with hill farming in National Parks and the culture of those who manage the landscape. The farming community has a huge sense of pride and connection with what they do. The interviewee has yet to see a convincing way of costing out what these intrinsic benefits are or the whole value of the heritage industry.

Some of the interviewees felt that the recent debate surrounding the PV approach has helped organisations engaged with heritage issues to be more thoughtful and reflexive about their activities. For example, there is now a deeper engagement with the social inclusion agenda within some organisations.

Criticisms of the PV approach

Not everyone who was interviewed was in agreement about the utility of the PV approach. What constitutes heritage is often contested and it was argued that public reflection on heritage values can often be superficial and given little thought. A major challenge, if the approach is to be useful, is to uncover what the public really cares about and why. An uncritical focus on what the public cares about may devalue the knowledge held by experts and lead to the marginalisation of 'hidden heritage'

such as archaeology. Another issue raised was the impenetrable nature of some of the concepts of the PV approach and the need to 'translate' the approach so that it had 'practical' applications. Questions were also posed about the meaning of institutional value and one interviewee felt that the use of the term value to describe the activities of institutions was confusing. It was suggested that the PV approach, through the categorisation of values, might prevent a holistic view of heritage being developed within National Parks.

It was stated that the PV approach was only one of a number of approaches, such as cost-benefit analysis, that could be used to measure heritage values and that there was no outstanding case for its adoption in preference to other approaches.

Manifestation of values in heritage policy and work

This area of questioning elicited a limited response from the interviewees. Viewing their activities in terms of particular sets of values was not something they had thought about or did as a matter of course. Most of the interviewees reported that the PV approach was not an explicit feature of their organisations heritage policy documents. However, one interviewee stated that their organisation was very familiar with the PV approach and its categorisation of values and that it had responded positively to calls to develop greater institutional value. As an organisation it is more reflective in what it does and this has resulted in practical outcomes where a major feature of the organisation is the empowerment of others. It was explained that the organisation is very aware of the power relations that exist in the understanding and management of heritage and that it has a role both as an expert voice and as a facilitator. It was suggested that the key to success was to be reflective and genuinely hear other opinions and share decision-making. Another interviewee suggested that many aspects of the PV approach were already part of NPA activities, although they may not be explicitly recognised as such. For example, National Park management plans and strategies clearly recognise the importance of National Parks as places that can generate and sustain educational, recreational, economic and social benefits and also the role that National Park Authorities and other organisations have in fostering benefit creation.

3.2.3 Maximising the socio-economic benefits of heritage

For each set of values (intrinsic, instrumental and institutional) the interviewees were questioned about how socio-economic benefits could be maximised and what needed to be done to achieve this. While it was agreed that, for analytical purposes, there may be advantages in breaking down heritage values into separate categories, a number of interviewees warned of the dangers of moving away from a more holistic and joined-up approach. A major theme to arise from the discussion was the importance of knowledge and understanding in terms of both the values themselves and the socio-economic benefits that are created. It was suggested that to extract the maximum benefit from each of the values a very hard-nosed approach needs to be taken in determining what benefits you want to create. In particular, there is a need to distinguish between soft (intrinsic) and hard (instrumental) social values.

Knowledge and understanding

It was suggested that much more should be made of the historic environment and that intrinsic and instrumental value would be enhanced if people (residents and visitors alike) had a greater understanding of the landscapes within National Parks. Interpretation was seen as the key to the value of heritage in National Parks. The major benefit of a deeper understanding of National Park landscapes would be the creation of a more positive context for the management of change. It was suggested that, at present, language and jargon deters greater engagement by the general public with heritage in National Parks. It was felt that significant numbers cannot engage in an intelligent debate because they don't have the language or tools to debate in a rational way. They need to be provided with the opportunities to be involved and think about the issues and the choices that are available. They currently view heritage as something that they are unable to influence.

Providing knowledge to empower people was seen to be a very different process than educating people to view National Park heritage in one particular way. It was suggested that NPAs had a role in providing heritage 'signposts' that helped to open people's minds to the possibilities of heritage, rather than providing a single 'route' and expecting everyone to follow. Here the challenge was for National Parks and partner organisations to refrain from being too prescriptive with regard to what the heritage value of National Parks is and how it should be interpreted. This means providing a broad framework, or 'signposts' within which individuals can form and reform their own connections with the National Park. An inclusive approach was not simply about bringing certain groups to the National Parks and providing a set explanation of what to appreciate.

Intrinsic value

The full range of social and economic benefits that can be derived from the intrinsic value of heritage has not been completely articulated. The creation of a framework within which to understand the benefits will help to inform ways in which these benefits can be maximised. It was suggested that National Parks were places where people can recover from the pressures of modern living and recharge their batteries. Also National Parks could perform an important role in helping 'displaced' people make connections with the environment and develop a sense of belonging on their own terms. National Parks can provide the context for building layers of emotion and marking a place with memories, which creates a deep sense of attachment and helps to foster social cohesion. Maximising this type of benefit requires a very different type of approach within heritage institutions.

In National Parks local distinctiveness and sense of place are key concepts that feature strongly in management plans but little is known about what they actually mean and what benefits they bring. Therefore it is difficult to develop policies that will secure and enhance them.

Instrumental value

The point was made that the most obvious benefits of heritage in National Parks are the instrumental values. Some in the farming community recognise that a strong sense of place can help sell their business and add value to their products. However, there are also tangible costs that come with heritage, such as planning restrictions in National Parks. In terms of institutional values, the NPAs have an important role in informing the public of the farmers' role in maintaining the landscape in the National Parks and the threats to that role. The NPAs need to consider how much of the heritage is an opportunity or a restraint and then have a dialogue about the acceptable new uses of the landscape.

Institutional value

Increasing institutional value is a real challenge in the local authority sector. One interviewee felt that a series of structural constraints (funding, work-place culture, targets) made it difficult for them to take major steps forward. Local authorities and other organisations have problems taking on board institutional values as a way of delivering more. There is a tendency for them to want to keep control. It was felt that until staff on the 'front line' really believed in the benefits of, for example, social inclusion it would be difficult to effect long-lasting change. There were opportunities to use heritage to excite and inspire people within institutions. Heritage organisations need to be able to articulate to the general public why heritage is important.

The value of the PV approach is that these organisations should be able to learn more about themselves as well as what they should do. It was suggested that the new heritage protection regime would provide greater opportunities for local and community involvement in decision-making. The new approach to conservation, being developed by organisations such as English Heritage, Cadw and the National Trust, recognises the importance of community value and social inclusion but the challenge is to make it effective and to deliver real benefits. There needs to be a strategic investment in making things like English Heritage's conservation principles work.

3.2.4 Applying the PV approach in heritage management and policy

Under this theme the interviewees were asked to make recommendations with respect to applying the PV approach to heritage management and policy in the future.

Information

A major theme that emerged from the interviews was that the PV approach depended upon and was underpinned by 'good' information. Heritage institutions must learn how to get the right message across in the right way. The feeling was that the sharing of information and knowledge would lead to a deeper understanding of the issues, which would in turn lead to the valuing and ownership of heritage. The PV approach was seen to be useful as it encouraged institutions to reflect upon their

'beliefs' and actions. One interviewee recommended that institutions needed to become more aware of the power different stakeholders had in relation to defining and expressing what it was that constituted heritage in National Parks. It was suggested that rapid progress could be made through the development of partnerships between stakeholders, particularly between NPAs and organisations that had practical experience of community empowerment.

Translation

It was recommended that the PV approach needed to be translated into a practical set of techniques and methods that can be applied by heritage organisations. Any approach that is aimed at empowering people will have a strong social element running through it and this social element should underpin the development of appropriate techniques and methods.

Mediation, animation and connection

Another recommendation was that to secure socio-economic benefits from heritage, the organisations involved need to mediate, animate and connect people to the place. They need to consider a range of questions relating to the benefits for the visitor, resident and institution which are all closely connected.

Summary

Key points arising from the face-to-face interviews were as follows:

- While there is awareness of the PV approach at an individual professional level the approach is not explicit in heritage policy documents;
- There were mixed views on the utility of the approach to inform heritage policy making and management; and
- The main advantage of the approach was seen as placing people at the heart of the heritage process and raising the profile of intrinsic values alongside instrumental values.

3.3 Identifying research priorities

Stakeholders were asked to contribute their thoughts on research agendas and priorities relating to the socio-economic benefits of heritage in National Parks at each stage of the consultation process, starting with the email survey. This section first articulates the main research agendas envisaged to be important in this area over the next five years, before focusing on the research priorities identified by participants at the three workshops, which were designed specifically for this purpose.

3.3.1 Scoping the research agendas

Respondents to the email survey and telephone interviews identified four main research agendas which they felt deserved attention over the next five years. A brief overview of each is given below.

- **Community:** Encompassing the contribution of heritage to quality of life; raising awareness and utilisation of heritage through community engagement and social enterprise (profit-making businesses set up to tackle a social or environmental need); reinforcing connections between communities and landscapes; exploring how National Park designation can be made more relevant to local communities; and examining the shifting interconnections between social, cultural and natural heritage in National Parks.
- **Agriculture and Environment:** Including surveys of the historic environment under woodland cover using remote sensing; impacts of climate change on the heritage resource and the relationship between changing agricultural practices and the cultural and natural heritage; interactions between food networks and landscape management; measurement of farming's contribution to management and protection of the historic environment; and the role and appreciation of cultural heritage in National Park landscapes.
- **Economy:** Including economic benefits of heritage and its various uses to help secure and support National Park budgets; estimating relative gains of investing in protection, promotion and enhancement of heritage assets; valuation of heritage public goods; and baseline research for use in the measurement and evaluation of heritage across all National Parks.
- **Policy and planning:** Including the role of National Parks in the archaeological research agenda; baseline research to encourage the conservation of traditional farm buildings in National Parks; understanding heritage change through mapping and identification of key drivers; attitudes of National Park planners and conservationists to heritage; research into local distinctiveness to assist National Parks to differentiate and promote themselves; and impacts of National Park designation on design and re-use within Parks; and impacts of designation on the historic environment outside National Parks.

3.3.2 Identifying the priorities

This section presents the findings of participatory workshops, undertaken with the specific remit of identifying from stakeholders their priorities for future research into the socio-economic benefits of heritage in National Parks. Again, this section comprises reportage from the workshops which has not been moderated by the authors. For consistency, it also uses the same language and terminology as was used by the stakeholders in the workshops.

Three participatory workshops (in Birmingham, Cardiff and York) were held between February and March 2008, with the specific aim of identifying stakeholder perceptions of research priorities relating to *the socio-economic benefits of heritage in National Parks*. The methods, which involved an iterative process to generate cross-grouping consensus on collective research priorities, are described further in Section 1.2.

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All three workshops yielded some extremely fruitful discussions around a broad range of issues, in turn reflecting the nature of the participants in terms of both expertise and spatial representation. As well as the broad discussion around National Parks generally, which considered both the needs of National Park managers and the potential implications of required research for park management (See section 3.1), discussion focused primarily around areas where further research was required to fully understand the nature and extent of the socio-economic benefits of heritage in National Parks.

The main output from each of the three workshops comprised a list of between 15 and 20 prioritised research themes resulting from the collective prioritisation of research needs at each stage of the iterative discussions. The prioritised research themes from all 3 workshops are listed in Table 3.1, the workshop in which the research theme was identified (B = Birmingham; C = Cardiff; Y = York) and a summary of questions relating to each theme. Such questions can be viewed as a starting point for the framing of research questions and related methodologies, which are developed further in Section 4. Depending on their primary focus, each of the listed priorities focusing on the socio-economic benefits of heritage in National Parks are classified under the following labels (or a combination thereof):

- Cross-cutting – National Parks (Research with a general focus on National Parks and which is cross-cutting in terms of socio-economic focus and discipline)
- Cross-cutting – Heritage (Research with a general focus on heritage and which is cross-cutting in terms of socio-economic focus and discipline)
- Social;
- Economic;
- Tourism; and
- Environmental.

Table 3.1 Research priorities identified at the participatory workshops

Classification				
Cross-cutting - National Parks	Work shop	Prioritised research theme	Description	Related Questions
Cross-cutting - National Parks	B, Y	Role and function of National Park designation	Contribution of NP designation to generating and sustaining heritage and the socio-economic benefits of heritage	<p>What are the socio-economic benefits of National Park designation?</p> <p>To what extent does NP designation reinforce (or otherwise) the socio-economic benefits of heritage?</p> <p>Are National Parks truly national?</p> <p>What strategic investment is needed to make connections and open up NPs to people across the nation? (Could be modelled on urban mosaic project)</p>
Cross-cutting - National Parks	B	National Parks Branding	Role of the National Parks brand in attracting visitors and maintaining communities	<p>What is the contribution of the NP 'brand' to a) attracting overseas visitors; b) attracting UK visitors to NPs; c) strengthening local communities?</p> <p>Which features of NPs dissuade visitors?</p> <p>Does this demonstrate the need for a holistic approach to heritage management in NPs?</p>
Cross-cutting - National Parks	B	Upland farming	Understanding and promoting upland farming	How can upland landscapes be maintained in relation to new pressures and opportunities in farming?
Cross-cutting - National Parks	B	Connections to heritage	National Parks as a vehicle for connecting people to heritage and beyond	How can NPs and NPAs act as a vehicle for reconnections to living heritage and living landscapes?
Cross-cutting - National Parks	B	National Parks and development	Role of National Parks in fostering or inhibiting development	Does NP conservation prevent socio-economic development and what impact does this have on the natural evolution of a place as part of its heritage?

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Cross-cutting - National Parks	Y	National Park and the region	Regional role and relevance of National Parks	What is the contribution of National Parks and their historic environment to the Government Office region, particularly in relation to regional agendas and priorities? What is the distinct contribution of heritage in this context?
Cross-cutting - National Parks	B	Education	Role of National Parks in education.	How do NPs provide essential life experience as part of education?
Cross-cutting - Heritage	Work shop		Thematic priority	Related Questions
Cross-cutting - Heritage	C	Heritage delivery	Delivery of heritage products and benefits in National Parks	What are the appropriate chains of responsibility and delivery for heritage in National Parks? How can delivery and responsibility be appropriately reconciled alongside other National Park functions?
Cross-cutting - Heritage	C	Heritage-related skills	Skills for heritage projects	What tools do stakeholders require for delivery of heritage projects? How can stakeholders best be tooled with these skills?
Cross-cutting - Heritage	Y	Distinguishing the historic environment	Benefits of the historic environment as distinct from the natural environment	How can the historic environment be meaningfully separated from the wider natural environment? What is the distinct contribution of the HE to socio-economic benefits, and how can these benefits be quantified?
Cross-cutting - Heritage	C	Heritage indicators	Development of indicators of heritage benefit	What are the most appropriate indicators of 1) heritage change and 2) heritage benefits? How can such indicators be a) operationalised; and b) implemented? How can such indicators be used in conjunction with indicators of climate and landscape change etc?
Cross-cutting -	C	Dynamic heritage	Dynamic heritage,	How can heritage change, and change in what constitutes

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Heritage			heritage in the past, present and future	heritage, best be identified and monitored? How do all types of stakeholder perceive heritage dynamics and change, and what are the implications of this for heritage management? How can monitoring and evaluation of heritage projects best be carried out?
Cross-cutting - Heritage	C	Heritage and European landscape Convention ELC	Heritage outcomes in relation to the ELC	How can heritage project outcomes be tested against ELC principles/criterion?
Cross-cutting - Heritage	Y	Modelling values	Modelling current and future values of heritage	What are the current values of heritage and how are these likely to change in response to agendas such as climate change and the agricultural economy?

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Social	Work shop		Thematic priority	Related Questions
Social	B,C, Y	Cultural mapping	Cultural mapping of heritage understanding, perception and definitions	<p>What is the map of heritage understanding and aspiration across all types of stakeholders and key players in National Parks?</p> <p>How can understanding between groups be fostered and nurtured?</p> <p>How do stakeholders, local and business people and socially excluded and ethnic groups understand and perceive heritage?</p> <p>How can this be used to help heritage use, management and delivery and support socio-economic development in National Parks?</p>
Social	B,C	Living landscapes	Connections with living landscapes and heritage	<p>What does it take to strategically inspire and make meaningful connections with living landscapes in terms of the use and value of National Parks?</p> <p>How can communities be re-connected with heritage?</p>
Social	B, Y	Volunteering	Benefits and expansion of volunteering in National Parks	<p>How can park managers expand their volunteer base from the traditional pool?</p> <p>What are the socio-economic benefits of volunteering?</p> <p>Can heritage volunteering be used as a trigger for training and skills development?</p>
Social	C	Heritage education	Educational benefits of heritage in National Parks	<p>What impact does heritage have on national educational attainments, lifelong learning and retention of local skills in National Parks?</p>

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				How effective is heritage interpretation for engaging people and visitors in active participation?
Social	B, C, Y	Sense of place	Heritage in the context of local distinctiveness (LD) and sense of place (SoP)	What contribution does heritage make to SoP and LD? How can both be fostered in National Parks through heritage? How do SoP and LD lead to increased confidence and economic development in local communities?
Social	B, C, Y	Community heritage	Role of cultural identities, community of heritage ownership and role of heritage in outreach communities	What is the role of cultural identities (including ethnic) in terms of a) pride and regeneration and b) social cohesion? What are the implications of this for National Parks? Can heritage attract returnees to an area and does it deter newcomers as part of an area's overall cultural identity? What communities have a strong sense of ownership of the HE and what makes them distinct? What potential is there for heritage to act as a point of engagement for urban ethnic and hard-to-reach communities in national Parks? What are the barriers to living, working and visiting National Parks across various demographic groups? What role can heritage play in addressing this?
Social	B, C, Y	Health and well-being	Heritage benefits in terms of health and well-being	What are the relative values of heritage assets in terms of health and well-being? What impacts does heritage have on deprived communities?
Social	C	Community values	Heritage and community values and development	What contribution does heritage play in maintaining and developing community values? What do communities need to develop and benefit from their heritage priorities?

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				How can a sense of ownership of heritage be generated in local communities? What are the indirect social impacts of heritage's benefits through economic development?
Social	Y	Community planning	Role of heritage in community planning and regeneration	What evidence is there of existing community involvement in heritage planning and management, and what elements of best practice can be learned and applied from this? What role can heritage play in social regeneration and social network development in National Parks? How can 'bottom-up heritage' best be implemented?
Social/Economic	B	Heritage values	Values placed on heritage	What values are placed on heritage, both generally and that within NPs?
Social/Economic/ Environmental	C	Cost Benefit Analysis (CBA)	CBA of heritage projects as a tool for decision making and resource allocation	How can a CBA of heritage projects best be developed and adapted as a tool for National Park managers and decision makers?
Economic	Work shop		Thematic priority	Related Questions
Economic	C	Heritage promotion	Economic opportunities for the promotion of heritage assets	What opportunities exist in National Parks to promote heritage as an economic asset?
Economic	C	Adaptive re-use	Potential for and benefits of adaptive re-use of heritage buildings	What are the costs and benefits of adaptive re-use of heritage assets in National Parks?

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Economic	B	Heritage management	Economic impacts of heritage management	How many jobs have been created in managing heritage properties and enterprises in National Parks?
Economic	B, C,Y	Heritage multipliers	Sub-regional and regional economic benefits of heritage, heritage assets and specific heritage sites in and beyond National Parks.	What are the measurable economic impacts of heritage in National Parks and its potential for creating income and employment etc? What are the local and regional multipliers associated with heritage? How does heritage make use of the existing human and physical capital of a Park? How does heritage promote use of other local products, i.e. food, quarried stone, timber and creative industries? What are the wider impacts of heritage and heritage management beyond National Park boundaries through trickle down and halo effects? How can impacts within and beyond parks be modelled to predict impacts in other designated and rural areas?
Economic	Y	Skill levels	Contribution of heritage and historic environment to skill levels	How does heritage contribute towards the skills base? In particular, craft skills? What implications does this have for local labour markets and retention of human capital? What is the contribution of heritage management to other parts of the economy?
Economic	B, C	Business location decisions	Impact of heritage on entrepreneurship and business location decisions.	What is the relative contribution of heritage to fostering entrepreneurship, innovation and business (re)location to National Parks?
Economic/ Environmental	C	Environmental accounting	Heritage values in the context of the climate change agenda	How do the values (i.e. willingness to pay) for heritage and landscape compare to values for the wider natural environment?

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Tourism	Work shop		Thematic priority	Related Questions
Tourism / Economic	C	Willingness to Pay (WTP)	Willingness to pay for heritage assets	What are the WTP values for various aspects of heritage and heritage management in National Parks?
Tourism / Economic	C	Heritage tourism	Benefits and dis-benefits of heritage tourism	What is the potential contribution of heritage to extending the tourism season in National Parks? What is the role of heritage in developing honey pots, zoning and carrying capacity?
Tourism / Economic	Y	Tourism values	Value of heritage tourism	What is the value of heritage tourism in National Parks, including value added to local business and spend per head? How can significant amounts of economic data be generated to inform this? What are the economic impacts of the use of heritage in local branding? How can heritage be used to strengthen and reinforce the branding of National Parks?
Tourism / Social Environmental	B	Rights Of Way networks	Value of ROW and open access to land to NPs	What value do ROW networks and open access land have for NPs, particularly in relation to health, well-being and social inclusion?
Environmental	Work shop		Thematic priority	Related Questions
Environmental	B	Adaption to Climate change	Adaption of the historic environment to climate change	How should cultural landscapes evolve and continue to produce benefits in the face of climate change and the wider sustainability agenda? What will be the likely impacts of climate change on the

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				heritage resource? What implications will this have for heritage design and management? What role can heritage play in adaptive and mitigation strategies to climate change?
Environmental	B		Contribution of heritage assets to sustainable development	Do heritage assets contribute to or prevent sustainable development? Is there a link between local distinctiveness and sustainability?

As the information in Table 3.1 indicates, a total of 39 thematic research priorities related to numerous inter-related research questions were identified at the three workshops, with 5 prioritised research themes identified at all three workshops. These 5 themes (highlighted in bold in the table) are:

- Cultural mapping of heritage understanding;
- Heritage in the context of local distinctiveness and sense of place;
- Role of cultural identities, communities of heritage ownership and role of heritage in outreach communities;
- Heritage benefits in terms of health and well-being;
- Sub-regional and regional economic benefits of heritage.

The first and last of these five priorities - cultural mapping and economic benefits – were strongly emphasised at all three workshops. Both of these thematic priorities encompass a wide range of issues and potential research questions which could usefully lead to a number of studies (some of which may be inter-related) to inform the debate. This emphasis on both the diversity of heritage understanding (social) and the quantified benefits of heritage (economic) support and embellish the findings from the other forms of stakeholder consultation summarised in the previous sections 3.1 and 3.2.

Two of these thematic priorities were also emphasised in the face-to-face interviews (See section 3.2), which followed the workshops; cultural mapping and research on local distinctiveness and sense of place.

- Cultural mapping. It was argued that deepening understanding of how stakeholders perceive heritage would require a facilitator, not a heritage specialist, to pull out the contrasting views of cultural landscapes. While such mapping would need to occur at a local (i.e. individual National Park) level, rather than at national or regional level, it would ultimately be useful to produce an integrated map across all English and Welsh National Parks. The need for research to develop better techniques to assist people in understanding and utilising the historic environment was also emphasised.
- Local distinctiveness and sense of place. It was recommended that research should be undertaken to investigate the impact of local distinctiveness and sense of place on businesses, and vice versa. Assuming public funds are limited, it was argued that businesses are likely to be the main agents of change in National Parks. Therefore to assist with future planning and management it will be important to know what businesses can do to enhance a sense of place and local distinctiveness, based on the principles of sustainable development. Such research would need to encompass local economies (including food and related products) practice on how to attract, develop and retain beneficial businesses.

The need for research into the processes involved in heritage (i.e. the ways in which heritage values are formed and re-formed by different individuals and groups) was

also emphasised in the interviews. It was argued that if you understand the processes then you can mediate, understand and connect and thus ensure a better chance of securing the benefits. For example, if farmers understand that organisations are working with them because they have important heritage which their forefathers helped to create and which they are the stewards of, then they are likely to look after it more and be able to tell their visitors about it. If they understand that visitors, by appreciating the heritage, become voters who support spending money on agri-environment schemes, then this is likely to bring financial benefits. In this context it was suggested that an action research approach, which could actually put projects and initiatives in place, might be particularly effective in empowering communities and unlocking the benefits of heritage, which would place people, rather than the site, at the heart of the process.

Many of the other thematic priorities identified by the stakeholders encompass a wide range of issues and have potential implications for an equally wide range of studies to reflect not only the diversity of the identified priorities but also the evident need for integrated studies able to capture benefits of varying types. The perceived need for research to help identify the implications for heritage management and practice in National Parks is also noted.

In the following section, the research priorities identified by stakeholders are examined in the context of the research gaps and methodologies highlighted by the literature review. In turn this allows a more targeted research programme to be assembled, informed by both the stakeholder consultation and literature review.

4. Gap analysis and research programme

This section identifies gaps in the knowledge and research base related to the socio-economic benefits of heritage in National Parks. It draws together our conclusions from the literature review (Section 2) and integrates them with the findings from the stakeholder consultation (Section 3). The intention here is not to repeat the gap analysis and discussion of research priorities presented in previous sections but to structure the analyses around the four key research themes that have emerged from this scoping study: General Policy and Management, Public and Social, Economic and Tourism.

Both the literature review and stakeholder consultation have revealed that there is an inadequate evidence base relating to heritage values and benefits within National Parks to inform policy and practice. The stakeholder consultation also revealed very little directly relevant work on the socio-economic benefits of heritage in National Parks to be planned or currently underway. While conceptual approaches to the understanding of heritage values and benefits are generally well developed and becoming increasingly sophisticated, the development of appropriate methodologies is less well advanced and there is very limited empirical evidence that is directly applicable in a National Park context.

In order to produce a targeted and workable programme which adheres centrally to the remit set out in Section 1, the authors are necessarily selective in their assessment of the research gaps, the prioritisation of potential research agendas by stakeholders, and the opportunities afforded by methodological developments (or otherwise) revealed by the literature. Whilst this selection itself represents a necessary process of analysis and synthesis to provide the clients with a sound and workable set of recommendations to take forward, there may well remain further potential research projects which are of interest to readers of this report.

4.1 General policy and management

Two cross-cutting themes emerged from the scoping study in relation to the general management and development of policy for heritage in National Parks: The influence of National Parks and Heritage values.

The influence of National Parks

The participatory workshops revealed a general lack of evidence on the impact that National Park designation has on the generation of socio-economic benefits from heritage, and the degree to which such benefits are different from those experienced in other areas. The literature review confirmed that, while there had been some coverage of studies highlighting a limited range of benefits there was a lack of comprehensive and overarching studies of heritage benefits within National Parks. Linked to this was the evident need to develop a methodology to measure and monitor the socio-economic benefits of heritage at different spatial scales in National Parks.

It is recommended that research is undertaken to determine the contribution of National Park designation and branding to generating and sustaining heritage and the socio-economic benefits of heritage. To understand the key socio-economic benefits of heritage in National Parks it is recommended that a fully integrated programme of research be carried out. In this regard, the individual projects outlined in the research programme are designed so that research findings can be combined to produce a comprehensive and overarching understanding of heritage benefits.

From an institutional perspective the scoping study has identified a need for research to better understand the role of NPAs and other stakeholders in maximising the socio-economic benefits of heritage. The findings of the stakeholder consultation suggest that research is required into the role of NPAs and other organisations in developing the understanding of heritage assets among visitors and residents. It was felt that the processes and techniques of using heritage to connect and reconnect people with the environment was poorly understood and the literature review confirmed that there is limited research in this area. It was suggested during the stakeholder consultation that NPAs face the challenge of engaging young people and ethnic minorities in heritage activities by making them both interesting and relevant.

The stakeholder consultation prioritised the need to develop better techniques to assist people to understand and use the historic environment. This needs to go beyond one-sided knowledge transfer to include a two-way process of knowledge exchange. It is also recommended that research be undertaken that incorporates a review and evaluation of existing knowledge exchange activities within National Parks and identifies best practice.

A lack of research into the delivery of heritage products and benefits in National Parks has also been identified in this study. Salient research needs in this regard are the identification of appropriate chains of responsibility and delivery of heritage benefits in National Parks and the reconciliation of heritage delivery with other National Park functions.

Heritage values

The need for research to improve understanding of core heritage intrinsic values, as a first step to understanding socio-economic benefits of heritage, was a strong theme throughout the scoping study. The stakeholder consultation identified a need for research to map heritage values, understanding and aspiration across all types of stakeholders with an association with National Parks, including residents and visitors. In addition, it was felt that this research needs to investigate how heritage values change through time and between different groups. Research to determine the extent to which the historic environment can be meaningfully separated from the wider natural environment was also deemed crucial.

The stakeholder consultation also identified a need for research to produce rigorous systems for monitoring and evaluating changes in heritage values. The creation of indicators of change was identified as a high priority. It is recommended that

research should initially be undertaken to develop and test a suite of indicators that will provide effective monitoring of change in heritage values relating to National Parks. This would enable park managers and policy makers to more effectively plan for managing heritage in the medium to longer term, and to ensure that visitor management is sustainable.

The literature review found that there is limited research available on the measurement of the intrinsic value of heritage, including the aesthetic and spiritual (or religious) value or the value in creating a sense of identity or place and a connection with the past. There is an evident need for research that identifies the contribution that heritage makes to the creation of a sense of place and to local distinctiveness and the linkage between this and the generation of socio-economic benefits.

4.2 Public and social benefits

In many ways this area of research chimed the most strongly with stakeholders in this study, with four out of the five most prioritised research agendas falling under the social umbrella. This was augmented by a literature review which revealed a dearth of information relating to the social significance of heritage in National Parks, and the need for methodological development to ensure that not only this significance but the multifaceted nature of heritage is captured appropriately. Much existing evidence is documented as being anecdotal and lacking any longitudinal element.

The need for cultural mapping of heritage understanding by all stakeholders with an interest or association in National Parks was emphasised strongly in the participatory workshops. In accordance with the literature, such research should form the bedrock of a research programme to tease out many of the benefits of heritage encompassed in this study.

A second area focused on by stakeholders was the role of heritage in local communities, including that relating to sense of place and local distinctiveness. This in turn can contribute to social inclusion and cohesion by developing 'pride in place' and helping to nurture community identity. The literature suggests potential for the environmental capital approach to this area of enquiry. Similarly, existing literature pointed to the need for research into the symbiotic role of social capital in fostering heritage as a tool to develop rural communities in National Parks.

Health and well-being was another area prioritised by stakeholders for research, with a need to assess the relative values of the heritage resource to public health and examine the impacts of heritage on deprived communities. Such research will necessarily require a quantitative element with respect to, for example, examining the relationship between National Park funding and potential savings in health costs.

4.3 Economic benefits

The scoping study revealed two broad areas of enquiry around which research into the economic benefits of heritage in National Parks can usefully be structured: Environmental economics and Rural and regional economics.

Environmental economics

Although stakeholders did not strongly emphasise the need for research incorporating consumers' willingness to pay (for both fee-paying and non-fee paying sites) and other environmental economic techniques to a great extent, they did express a need for the use of environmental economic techniques to aid decision making. The literature certainly revealed considerable potential for the application of such methodologies to the case of heritage in National Parks. This remains an under-researched field and could be of great use to Park managers and policy makers in decision making for heritage management and prioritisation of heritage assets for resource allocation.

In particular, the literature points towards the need for integrated studies to capture the multi-dimensional, multi-value and multi-attribute nature of heritage and for a cost effective application of environmental economic techniques which include attempts at transferring values and benefits across National Parks and between heritage assets. This scoping study also highlights the need for the application of environmental accounting techniques in comparing heritage values with those of wider environmental concern and accounting for environmental impacts of management and development within National Parks.

Rural and regional economics

A recurring theme throughout the stakeholder consultation which has hitherto been inadequately addressed in the literature is the need to disaggregate appropriately the benefits of the historic environment from the wider natural environment in National Parks. While methodologies exist around which this area of research can be developed, the lack of a sound conceptual framework and empirical evidence base represents both an important gap in the literature and a priority for decision makers tasked with managing National Parks. Initial studies should seek to identify the distinct contribution of the historic environment to the commercial viability of National Park businesses before attempting, perhaps in conjunction with targeted multiplier analyses, to reveal the impacts of historic and cultural heritage-related sectors on local economic development.

Indeed, regional and sub-regional multipliers arising from the existence, conservation and management of heritage in National Parks was prioritised strongly by stakeholders in this study. With a focus on income and employment multipliers, this included the shadow, or halo, effects of heritage, not only in terms of cross-sectoral impacts but also in terms of the wider trickle-down effects beyond National Parks boundaries. While the literature review has revealed some useful studies (i.e. Edwards et al 2005; Courtney et al 2007a) to build upon in this respect, there exists

great potential to contribute to the knowledge base in this area, both geographically and methodologically. In particular this should include further development of existing methodologies (E.g. Edwards et al 2005; Courtney et al 2007a), not only to capture the economic benefits of specific heritage assets, management and associated funding, but to also account for associated social and environmental (dis)benefits within the economic framework. Such work would be of benefit to park managers and policy makers, not only in helping to account for impacts of planning decisions on the historic environment, and for the benefits of the historic environment to the economy, but also to ensure that the historic environment is not sidelined as a result of the climate change debate, which may favour environmental assets with the ability to offset carbon.

In terms of geographical coverage of regional and sub-regional economic research, the combined message of the literature review and stakeholder consultation is a need to capture impacts in (and around) as many English and Welsh National Parks as possible, whilst also developing and testing methods to allow a more cost-effective roll-out of appropriate research programmes, perhaps utilising secondary data from existing studies (such as Hyde and Midmore 2006; Courtney et al 2007a), to allow robust estimates of impacts in un-surveyed areas and effective transfer of estimates from pilot sites where sufficient secondary data exists. In both regards lessons can most certainly be learnt from a state wide programme of research into the impacts of historic preservation that has been undertaken in the USA (E.g. Rypkema, 2001).

4.4 Tourism benefits

An important theme running through both the literature review and stakeholder consultation in this area is the need to disaggregate heritage from the many attributes of National Parks which, in combination, help shape their tourism and its wider impacts. A useful starting point for this is the cultural mapping exercise discussed in the previous section, which should then be further developed to identify the importance of heritage assets to all types of visitor to National Parks.

Estimations of non-market benefits using stated preference techniques would be extremely useful in this regard and would, in turn, help Park managers and policy makers prioritise heritage sites (both fee-paying and non-fee paying) and assets for investment. More qualitatively, an assessment of non-market benefits should also extend to the social benefits of heritage-related tourism, for both visitors and host communities alike.

The need and potential for estimating the impacts of heritage-related tourism to the local economy was emphasised by both the literature and participatory workshops. Estimations of income and employment multipliers for various types of attraction, site and area will, in combination with the estimation of non-market benefits, also help illustrate the case for targeted investment in the heritage resource.

In order to place a robust value on the contribution of heritage to the tourism economy in National Parks, estimation of shadow values is evidently crucial. It too, however, remains severely under-researched in the context of National Parks and there is great potential to adapt existing methodologies for this purpose with the collection of appropriate primary data from both visitors and businesses in National Parks and their surrounding locales.

A final area of research prioritised by stakeholders in this study is that relating to both tourism and heritage management in National Parks, to help foster benefits on the ground. Such research could usefully include a study into the impacts of heritage in local branding and the contribution of heritage to extending the tourism season and developing honey pots in National Parks. Again, the importance of devising a robust method of disaggregating heritage and the historic environment from the wider natural environment cannot be over estimated.

4.5 Research programme

The research programme derived from the extensive literature review and stakeholder consultation undertaken during the course of the study, is set out in Table 4.1. This contains a total of 22 potential research projects to address current gaps in the knowledge base under four headings: General policy and management (4 projects), Social (5), Economics (8) and Tourism (5). For each project, an indication of the priority for the research (as perceived by stakeholders and the research team) is given, together with a classification of the methodological scope and the context of the research in terms of its geographical and sectoral relevance.

This information is provided according to a key, which is given below. In addition, the table also contains a short narrative for each project outlining the research aims, further details about the proposed methods and the anticipated use and outcomes of the research. The final column of the table provides an indication of the potential inter-relationships between the 22 projects, which could in turn be used by funders to assemble sub-programmes of research centred around distinct themes. Most notable in this sense is the Cultural Mapping study (Project 1), which is an important precursor to the majority of projects in the research programme. As such it is recommended that this study be prioritised for future research and is carried out prior to any other projects.

The research programme: Key to Table 4.1

P (Priority)	M (Methodology)	S (Spatial context)	A (Area context)
<p>1 = High 2 = High / Medium 3 = Medium</p>	<p>1 = Scoping/Methodological development 2 = Implementation of new methodology 3 = Adaption / further development of established or existing methodology(s) 4 = Application / replication of a previous study(s) or existing methodology(s)</p>	<p>1 = Local. Initiated in one (or more) NP and findings / good practice extrapolated to others 2 = Regional. Selective involvement of case study NPs to make within, and between, regional comparisons 3 = National. Collective involvement of NPs with findings of national relevance</p>	<p>1 = Applicable to wider heritage sector and rural areas with relevance to NPs 2 = Relevant to NPs and other designated areas (with potential wider heritage relevance) 3 = NP specific (with potential wider heritage relevance)</p>

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Table 4.1 Research programme

Project No / reference	P	M	S	A	Aims	Research Methods	Anticipated outcomes	Related projects
General policy and management								
1. Cultural mapping	1	3	3	3	To produce a cultural map of heritage values, importance and understanding across the range of National Park stakeholders including park managers, policy makers, farmers, residents and visitors.	Document analysis of park management plans and policy documents with reference to heritage management and understanding; In-depth interviews and focus groups with stakeholders; national research and policy conference.	This study will yield a clear working definition of heritage for the purposes of National Park management and further research. More importantly the study will provide a clear understanding of the ways that heritage is perceived and valued across stakeholder groups and informed implications of the findings for heritage and park management and targeted research into the socio-economic benefits of heritage in National Parks. As such this project is seen as the bedrock for the majority of projects in this research programme.	2, 3, 4, 5, 7, 8, 10, 13, 15, 16, 21, 22
2. Heritage indicators	2	3	3	2	To develop and test a suite of indicators that will provide effective monitoring of change in heritage values relating to National Parks.	Document analysis; Database analysis; Interviews with key actors in NPAs and other organisations; Focus groups; policy workshops; Empirical testing of indicators.	The heritage sector is currently poorly served with techniques with which monitor and evaluate changes to heritage value. Drawing on Blaug et al (2006); Evans and Shaw, (2004); National Trust (2004) this project will develop and test a suite of cost-effective indicators with which to monitor change in heritage values.	1, 3, 4, 8, 16
3. Institutional values	2	3	3	3	To review and evaluate existing institutional arrangements and identify best practice in National	Policy evaluation; Document analysis; Interviews with key actors in NPAs and other organisations;	The Public Value Approach identifies institutions as major actors in the construction as well as the	1, 4, 8, 16

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					Parks with regard heritage, including: knowledge exchange activities; change of responsibility; heritage and management and delivery of heritage benefits.	Focus groups; policy workshops.	management of heritage value. The actions of institutions have a significant impact on the nature and extent of social and economic benefits derived from heritage. Building on Clark, K. (2006); Demos (2004); Kelly, et al (2002); Moore, M. (1995); National Trust and Accenture (2006), this study will deepen our understanding of the role of NPAs and other organisations in maximizing the socio-economic benefits of heritage. It will investigate the role of the key actors in the heritage process, identify best practice and make recommendations to improve policy making.	
4. Public value	2	4	3	3	To critically evaluate findings from the proposed projects on institutional (3), intrinsic (8) and instrumental (16) values in the context of the Demos (2004) framework and indentify policy implications for heritage management in National Parks.	Evaluation and synthesis of key findings from research projects 3, 8, 16. Focus groups, policy seminars and national conference.	The Public Value Approach is a relatively new method of determining value and the implications for policy formulation have yet to be fully articulated. This study will specifically consider the policy implications for heritage management in National Parks.	1, 3, 8, 16

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Project No / reference.	P	M	S	A	Aims	Research Methods	Anticipated outcomes	Related projects
Social								
5. Sense of place	1	3	3	3	To identify the contribution that heritage specifically makes to the creation of a sense of place and to local distinctiveness.	Review of literature linking heritage to creation of sense of place and local distinctiveness. Document analysis of park management plans and policy reports identifying the contribution of heritage to sense of place. Interviews with key actors in NPAs and other organisations to ascertain the role of heritage in creating a sense of place in National Parks. Focus groups involving residents and visitors to the National Parks to identify particular heritage attributes that contribute to creation of local distinctiveness.	This study will develop a comprehensive understanding of the elements of heritage in National Parks that contribute to the creation of a sense of place and local distinctiveness. It will build on the Historic Landscape Characterisation approach (English Heritage, 2006c).	1, 7, 10
6. Health and well-being	2	3	2	1	To explore the extent to which heritage in National Parks contributes to health and wellbeing.	Conduct a wellbeing survey using subjective wellbeing measures (life satisfaction, evaluation of emotions and moods) of those working and living in heritage buildings or landscapes in National Parks. Conduct a survey of the physical and mental health of participants in heritage activities using measures such as the Euroqol EQ-5d, the General Health Questionnaire, Rosenberg's Self Esteem Scale and the Profile of Mood States test	This study will build on the analytical framework developed by Newton, (2007) for measuring the wellbeing benefits of the natural environment. It will identify the impact that exposure to heritage has on the health and wellbeing of residents and visitors to National Parks.	7, 8, 16

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						(POMS).		
7. Social capital	1	3	1	2	To identify the extent to which heritage contributes to the development of social capital in local communities, and vice-versa, in National Parks.	Literature review; desk-based studies of heritage and community initiatives; ethnographic techniques; participant observation; in-depth interviews; action research; policy seminars.	The symbiotic relationship between the development of social capital within local communities and the management of heritage initiatives and assets could be significantly useful for park managers and policy makers seeking ways of engaging communities in heritage management and in fostering cohesion and co-operation in National Park communities. This exploratory, participatory study would provide stakeholders at all spatial levels with new knowledge, and knowledge sharing between private, voluntary and public sectors, as well as raising the profile of heritage in National Park communities through its practical, action research approach.	1, 5, 8, 12, 19
8. Intrinsic values	1	1	1	1	Develop methods and tools to measure the intrinsic value (historical, social, symbolic, aesthetic and spiritual) of heritage assets in National Parks.	Exploration of suitable methods used in anthropology and millennium ecosystem assessment of cultural services, such as contextual analysis, social survey methods, psychometric measurement; expert appraisal.	Traditionally, intrinsic values of heritage have been estimated by experts, but this study will develop appropriate tools and a more rigorous way of measuring intrinsic values.	1, 3, 4, 5, 16
9. Education	2	4	2	1	To assess the extent to which heritage assets within National Parks are effectively used as educational resources.	Use of the Generic Learning Outcomes approach to evaluate the impact of heritage assets in National Parks on learning. This will include a	The study will build on the Generic Learning Outcomes approach (GLOs) which has been developed by the Museums, Libraries and Archives	4, 8, 16

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						review of existing data sources, in-depth interviews with visitors and teachers and implementation of exit surveys.	Council to evaluate this sector (see www.inspiringlearningforall.gov.uk). It will provide a comprehensive evaluation of the extent to which heritage assets in the National Parks provide educational benefits. It will also identify areas where this provision could be improved.	
Economic								
10. Multi-dimensional framework	2	1	2	2	To develop a conceptual framework and robust, streamlined methodology for a multi-dimensional study of heritage values and benefits across National Parks.	Participatory techniques; Q methodology; In-depth interviews and focus groups with academic and policy experts.	Arising principally from the work of Mazzanti (2002), and building on the cultural mapping project (1), this scoping study will allow a multidimensional study of market and non-market benefits of heritage in National Parks. A key output should be the basis of a research brief to be used in the tendering process for a substantial cross-National Park study.	1, 11, 12
11. Total Economic Values	2	3	1	2	To systematically examine the Total Economic Value (TEV) of heritage assets in National Parks.	Stated preference techniques, including: Contingent valuation; Choice modelling; Conjoint analysis. Revealed preference techniques, including: hedonic pricing; Travel cost methods. Supported by resident and visitor surveys; in-depth interviews; focus groups; GIS analysis.	There is considerable potential highlighted by the literature (See for example Noonan, 2003) to estimate the values of the contribution of heritage 'goods' and assets to socio-economic well being in National Parks. Such estimates should assist park managers and policy makers in decision making for resource allocation, heritage conservation and management and in publicising the wider benefits of National Park heritage to wider society. This	10, 12

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							project, or series of linked projects, should ideally build upon the above scoping study (10).	
12. Market stall	2	3	1	2	To examine consumer willingness to pay for heritage conservation and management in National Parks.	CV Market Stall: Focus groups; participatory workshops; consumer surveys; policy seminars.	Identified as a distinct project which could form part of the above programme (11), CV Market Stall has been shown by the literature (see for example Macmillan et al, 2002) to be a potentially more reliable method for eliciting heritage use and non-use values than traditional CV. Such information would be of use at varying spatial scales; assisting in individual site management through to cross-park policies on heritage management and conservation.	10, 11
13. Historic Environmental accounting	1	1	3	1	To construct an environmental accounting framework to help measure, support and influence the sustainable development of National Parks which explicitly integrates the historic with the natural environment.	Extensive review of the academic, technical and policy literature; document analysis; in-depth interviews and focus groups; technical and policy workshops.	Taking the UNs system of Integrated Environmental and Economic Accounting (SEEA) as the first reference point, this scoping study would seek to provide a valuable and workable tool for Park managers and policy makers not only to help achieve sustainable development objectives in National Parks but to ensure that the costs and benefits of heritage and the historic environment are captured alongside, and distinct from, the wider environmental. The output from this study would be an empirical methodology, and basis	1, 4, 10, 11, 16

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									for a research brief, that could subsequently be implemented in case study National Parks. This empirical framework would allow the implications for sustainability of heritage consumption and production to be examined, as well as the economic consequences of maintaining or otherwise, the historic environment in National Parks. Inherently, it would also have an important role to play in managing the historic environment for climate change mitigation and adaption.	
14. Wider impacts of Historic preservation	2	3	1	2	To undertake a National Park- wide programme to systematically examine the wider economic impacts of the heritage resource, heritage management and historic preservation in National Parks.	Questionnaire surveys of heritage and tourism businesses and attractions in pilot study areas; Assembly of secondary data and assessment of potential for benefit transfer proxy variables.			This mini research programme would usefully apply methodologies used in US National Parks on measuring the impacts of historic preservation (e.g. Clarion Associates and BBC Research and Consulting, 2005) and wider economic benefits (Hardner and McKenney, 2006). It would also build on economic impact work carried in UK National Parks (Council for National Parks, 2006; Hyde and Midmore, 2006). Unlike previous studies this would specifically target benefits of the heritage resource in national Parks. Important elements of the work include Business and resident location decisions, property values	16, 17

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								and socio-economic regeneration. Targeted case studies followed by extrapolation (through benefit transfer and assembly of proxy variables) would provide policy makers with a transferable data sets to inform national decision making on heritage for National Parks. A pilot study in one or National Parks is suggested initially.	
15. Rural development	2	4	2	1	To identify the various heritage-related activities in National Parks and measure the contributions of heritage activities to rural development relative to other sectors.	Applying the methodology of Courtney et al (2007): Questionnaire surveys involving all heritage and industrial sectors; Keynesian multiplier analysis, econometric techniques; focus groups.	After identifying the various heritage-related sectors (for example 'core' and related') in National Parks, this study will provide policy makers with some empirical data (including multipliers and statistical coefficients) on the relative contributions of heritage activities to employment and income generation in sub-regional and regional economies.	1, 16, 17, 19, 20, 21	
16. Instrumental values	1	3	2	2	To investigate the local economic impacts of various forms of heritage management and funding, including community-based heritage assets, within, and beyond, National Parks.	Concise empirical review of a) heritage management and funding examples; b) Scoping for extrapolation of findings to un-surveyed parks; and c) community-based heritage assets using desk-based research and telephone interviews across all National Parks. Development of a community-adapted LM3 model. LM3 analysis, incorporating the contribution of community-based assets, in a	This study would build on the economic impact work undertaken in the Lake District and Yorkshire Dales National Parks (Edwards et al, 2005; Courtney et al, 2007a), extending it in terms of geographical coverage; the breadth of heritage and heritage management covered; and in terms of capturing both economic and social, community based linkages in an adapted LM3 model (See Sellick and Sumberg,	1, 3, 4, 8	

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						sample of National Parks. Estimation of sub-regional and regional income and employment multipliers for various attributes Scoping for benefit transfer of revealed impacts to un-surveyed Parks.	2008). The result would be a comprehensive analysis of the instrumental values of heritage across National Parks.	
17. Settlement functions	3	3	1	1	To investigate the role of heritage and the historic environment in influencing the 'cultural orientation' of market town consumers and businesses in and adjacent to National Parks.	Consumer and business surveys; local economic analyses; qualitative interviews; development of tools to predict benefit estimates for use by stakeholder groups.	Drawing on selective findings of the rural development (15) and instrumental values programme (16) and adapting previous work on town-hinterland linkages (Courtney et al 2007b) this project would provide policy makers with an assessment of how heritage influences the functioning of National Park towns, and how it influences the economic activity patterns of town producers and consumers. This should then feed into a wider data base on Park towns and policies to stimulate wider rural development of Park sub-regions.	15, 16
Tourism								
18. Non-market benefits	2	4	1	2	To estimate non-market and social benefits of heritage-related tourism to visitors and host communities.	Visitor surveys; stated preference techniques including; in-depth interviews; focus groups.	Non-market values arise because of the existence of external economic effects in the operation of market economies. Heritage may be associated with positive and	10, 11, 12

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							negative externalities and these non-market values may make a substantial contribution to the total economic value of Parks (see project 1), and rural development (15). This project could provide national and regional tourism bodies with an empirical assessment of the benefits of heritage related tourism in National Parks, and importantly of the heritage related benefits as distinct from the wider natural environment.	
19. Heritage tourism multiplier	2	1	3	2	To develop a tool to allow measurement of the impacts of heritage-related tourism to the local economy.	Business and visitor surveys; estimations using an adapted LM3 model; expenditure partition methods; multiplier analysis.	Building on and using data from the instrumental values study (16) as a test bed, this scoping study would seek to develop a practical tool to allow Park managers to estimate, and monitor, the local economic multiplier arising from heritage related tourism in the Park.	15, 16, 17
20. Shadow values of heritage	1	3	1	1	To estimate the shadow values (economic outcomes of positive non-market values) of heritage-related tourism in National Parks.	Business and visitor surveys; Keynesian multiplier analysis; collation of secondary tourism data; expenditure partition methods.	Two types of shadow value will be distinguished. The first arises from the recreational value of heritage which gives rise to visitor and tourist expenditures in the local economy. The second shadow value is associated with the role of heritage in adding to the perceived quality of life or attractiveness of National Parks to both households and businesses. As these households and businesses, in turn, provide	16, 17, 19

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							local income and support local jobs, this study will be of interest to local, regional and national agencies seeking not only to account for heritage related tourism adequately in the local economy, but also to maximise benefits of existing and future heritage related tourism initiatives in National Parks.	
21. Tourism and Park branding	2	2	3	3	To examine the impacts and effectiveness of heritage on local tourism branding in National Parks and to examine the impacts of National Park branding on sustaining the socio-economic benefits of heritage.	Business surveys; consumer surveys in-depth interviews with stakeholders; focus groups; policy seminars.	Following an analysis of tourism and park branding in relation to heritage, this study would constitute a test bed for developing and rolling a national strategy for park branding, together with a strategy for tourism branding within parks which explicitly recognises, and draws on, heritage and the historic environment in National Parks.	1, 4, 12
22. Tourism management	2	3	2	3	To explore the contribution of heritage to tourism management in National Parks; and the potential for enhancing links between tourism agencies and National Park Authorities with regard to heritage.	In-depth interviews; action research; Best practice workshops.	Focussed at the individual park level, this study would actually implement new working relationships between stakeholders using an action research 'case work' approach (See Owen et al 2007). The principal output would be a series of best practice guidelines to enable both continuation of existing initiatives and the implementation of new initiatives across National Parks.	1, 2, 7, 21

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Summary references for the classification of heritage valuation studies*

Author(s) Year	Country	Valuation Methodology
Adamowicz <i>et al.</i> (1995)	UK	Contingent Valuation
Alberini <i>et al.</i> (2003)	UK	Choice Experiment
Alberini <i>et al.</i> (2004)	Italy	Contingent Valuation
Alberini & Longo (2006)	Albania	Travel Cost Method Contingent Valuation
Apostolakis & Jaffry (2005)	Greece	Choice Modelling
Bateman & Langford (1997)	UK	Contingent Valuation
Bedate <i>et al.</i> (2004)	Spain	Travel Cost Method
Beltran & Rojas (1996)	Mexico	Contingent Valuation
Bolling & Iversen (1999)	Tanzania	Contingent Valuation
Brown (2004)	UK	Contingent Valuation Choice Experiment
Brown (2004)	UK	Contingent Valuation

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		Choice Experiment
Brown (2004)	UK	Choice Experiment
Boxall <i>et al.</i> (2002)	Canada	Contingent Valuation
Campbell <i>et al.</i> (2007)	UK	Choice Experiments
Carson <i>et al.</i> (1994)	Australia	Contingent Valuation
Carson <i>et al.</i> (2002)	Morocco	Contingent Valuation
Chambers <i>et al.</i> (1998)	US	Contingent Valuation
Costa & Manente (1995)	Italy	Choice Modelling
Coulton (1999)	UK	Contingent Valuation
Del Saz Salazar & Marques (2005)	Spain	Contingent Valuation
Dutta <i>et al.</i> (2007)	India	Contingent Valuation
Eftec (1999)	Peru	Contingent Valuation
Garrod & Willis (2002)	UK	Contingent Valuation
Grosclaude & Soguel (1994)	Switzerland	Contingent Valuation
Kim <i>et al.</i> (Kim <i>et al.</i> , 2007)	Korea	Contingent Valuation
Kling <i>et al.</i> (2004)	US	Contingent Valuation
Laplante (2005)	Armenia	Contingent Valuation
Lee & Han (2002)	Korea	Contingent Valuation
Lockwood <i>et al.</i> (1996)	Australia	Contingent Valuation
Maddison & Foster (2003)	UK	Conjoint Analysis
Maddison & Mourato (2002)	UK	Contingent Valuation
Martin (1994)	Canada	Travel Cost Method
Mazzanti (2001)	Italy	Choice Modelling
Morey <i>et al.</i> (2002)	US	Choice Experiment
Morimoto (2005)	Laos	Conjoint Analysis
Mourato <i>et al.</i> (2002)	Bulgaria	Contingent Valuation
Navrud & Strand (2002)	Norway	Contingent Valuation
Pagiola (1999)	Croatia	Contingent Valuation
Pollicino & Maddison (2002)	UK	Contingent Valuation
Pollicino & Maddison (2002)	UK	Contingent Valuation
Poor & Smith (2004)	US	Travel Cost Method
Riganti & Willis (2002)	Italy	Contingent Valuation
Ruijgrok (2006)	Netherlands	Hedonic Pricing
		Contingent Valuation
Santagata & Signorello (2000)	Italy	Contingent Valuation
Sanz <i>et al.</i> (2003)	Spain	Contingent Valuation
Signorello & Cuccia (2002)	Sicily	Contingent Valuation
Turpie (2003)	South Africa	Contingent Valuation
Whitehead & Finney (2003)	US	Contingent Valuation
Willis (1994)	UK	Contingent Valuation
Willis (2002)	Italy	Contingent Valuation

*See Appendix 1 of the Technical Annexe for a fuller version of the above table. Full references are contained in the corresponding reference list in the Technical Annexe.

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