

September 2022

National Lottery Heritage Fund Strategy Development Research

A report by BritainThinks

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1. Background and objectives

1.1 Background

The National Lottery Heritage Fund's 2019 strategy 'Inspiring, leading and resourcing the UK's heritage' outlined the vision and principles for National Lottery investment over the next five years. This strategy advocated for the value of heritage in society whilst also emphasising the need for collaboration, skills sharing, innovation, capacity building and resilience within heritage.

However, the 2022 landscape is very different, with new and persisting challenges. Heritage has suffered a loss of income due to coronavirus (COVID-19), and the cost of living crisis is likely to compound these effects. This is predicted to impact all aspects of heritage, affecting: citizen priorities; funding models; volunteer and workforce behaviours; and visitor mindset. Meanwhile, current priorities focusing on the need to address the climate crisis and embed diversity and inclusion into the Heritage Fund's work have become more urgent and pronounced.

The Heritage Fund is therefore developing a fresh strategy that reflects this changed landscape, a strategy that will enable it to support the UK's heritage over the next 10 years.

1.2 Aims and Objectives

BritainThinks was commissioned to help ensure the Heritage Fund's new strategy is rooted in public and stakeholder priorities for heritage and reflects how these have changed over time. Central to this consultation is acknowledgement of the dynamic and self-designated nature of heritage, and the need for equality, diversity and inclusion throughout this process. The Heritage Fund supports people to self-define their heritage, based on what they see as important, whilst also accounting for the under-representation of many of the population in heritage.

It was therefore crucial that this project:

- Gathered insight from the public and stakeholders, and compares and contrasts these views
- Explored public attitudes, experience and understanding of heritage beyond the strategy refresh
- Unpicked key questions on place, approach to partnership and size or scale of grants

For the public strand, the research objectives were to:

- Investigate and present the public's current perceptions of, and sentiment towards, UK heritage
- Understand how attitudes to heritage have changed due to the impact of COVID-19
- Understand views on importance of heritage and views on how public bodies should decide on what to support and which geographic areas to prioritise in terms of funding
- Examine how people relate to local heritage

For the stakeholder strand, the research objectives were to:

- Understand what changes and developments are expected for those working in heritage over the next 10 years
- Decipher how well the Heritage Fund's priorities are aligned with current needs and priorities of organisations working in heritage, and how these will need to change over the next 5-10 years
- Understand organisations' priorities for Lottery funding including the balance of local vs national projects, and the balance of targeted and open funding
- Understand attitudes towards a place-based approach to funding specifically, what heritage can bring on a regional/country and local/community level over the next 5-10 years, and how areas should be prioritised for funding
- Test the Heritage Fund's current objectives and outcomes to determine which still represent priorities for heritage
- Understand how the Heritage Fund can support heritage in the UK beyond funding

1.3 Methodology and sample

The fieldwork for this project ran from Friday 6th – Thursday 22nd August 2022. A mixed methods approach was utilised in order to gather a broader view from a large sample of participants, as well as give opportunities for more detailed and nuanced feedback. The research was comprised of the following components:

Public qualitative research

A four-day online community followed by a 90-minute online workshop with a range of members of the public

- The online community took place between 5th – 8th August and consisted of 43 members of the public. It was exploratory in nature, understanding the starting point of the public in relation to heritage and its future, as well as priorities going forward.
- The workshop took place on 9th August consisted of 34 members of the public who had previously taken part in the online community. It was comprised of a plenary session all together followed by break-out groups, which allowed for in-depth discussions on funding prioritisation and trade-offs.

An online approach was used for this research to reach a wider geographic spread of participants – from all four nations – whilst ensuring demographic representation. Working with local recruitment partners, the sample was recruited from a set list of locations agreed with the Heritage Fund, to ground the conversation in local heritage and build a sense of community around this.

The sample included participants aged 16 – 60+ from all across the UK, with representation from England, Scotland, Wales and Northern Ireland. There was a spread of gender, socioeconomic grade and ethnicity across participants. The sample was split by current engagement with heritage¹, resulting in the following categories:

¹ Engagement with heritage was defined according to the following:
Low engagement – those with 0-1 physical/digital engagements in the past 6 months;
Medium engagement – those with 2-4 physical/digital engagements in the past 6 months;
High engagement – those with 4+ engagements in the past 6 months.

- Low engagement: 8 participants
- Medium engagement: 16 participants
- High engagement: 19 participants

Public quantitative research

A short online survey with 2,215 members of the public.

- The survey was conducted online between 19th – 22nd August and consisted of an 11-question omnibus survey of 2,215 members of the public, weighted to be nationally representative of UK adults in terms of age, gender, social economic grade, ethnicity and region. A full breakdown of the sample can be found in the Appendix.

The sample included a boost in Northern Ireland and Wales to achieve minimum 150 completes each to allow greater confidence when reporting differences between the nations of the UK.

- The survey covered general views and behaviours around heritage, engagement and interest in local heritage, awareness of The National Lottery Heritage Fund and priorities for heritage funding

Stakeholder Engagement

5 x 90-minute online workshops with stakeholders, split by geography

- Stakeholder workshops took place between 16th – 18th August, with 78 stakeholders taking part.
- Stakeholders were from a wide range of organisations and represented heritage types including community heritage, buildings and monuments, cultures and memories, industrial, maritime and transport, landscapes, parks and nature and museums, libraries and archives
- Workshops were split by geography, consisting of an England, Wales, Northern Ireland, Scotland and a UK-wide workshop.
- Workshops consisted of a plenary session all together followed by break-out groups, which allowed for in-depth discussions on challenges, opportunities and funding priorities.

Please note, throughout this report we have used call out boxes and quotes to illustrate points and call out any key audience differences and similarities. Green denotes the public, and blue denotes stakeholders. Attributions for relevant audiences also can be found underneath each quote and within any call out boxes.

2. Executive summary

Among the public, there is currently a relatively narrow understanding of what heritage includes. However, upon probing, interest in all types of heritage is high.

Spontaneous associations of heritage are normally focused on site-specific activities such as visiting historic buildings, parks or gardens and visiting museums or galleries. However, upon being shown a broader list of activities that can be categorised as heritage, the public indicate interest in non-site-specific activities including intangible and cultural heritage, and digital heritage.

There is strong awareness and appreciation of the benefits of heritage, both at an individual level and its broader benefits to society.

Members of the public frequently cite highly memorable, even awe-inspiring personal experiences of heritage, as well as general enjoyment and entertainment. They also mention the importance of preservation for future generations, connecting with the past and providing learning opportunities as being key.

Many say they would like to engage with heritage more, however cost is the main barrier for not doing so.

With the benefits clearly laid out, there is appetite among the public for greater participation in heritage. Currently, cost is the main barrier for not doing so, with concerns not just about admission tickets but additional costs involved, e.g. transport and food. This is likely driven by primary associations of heritage being an on-site activity rather a digital or low or no cost experience. These concerns about cost have been heightened as a result of the cost of living crisis.

Stakeholders feel that they are operating in a challenging context, with both wider societal issues and heritage-specific challenges feeding into this.

Both the cost of living and climate crises feature heavily in discussions about heritage. These are viewed as key challenges that, like all other industries, heritage must navigate through. Beyond this, stakeholders also cite specific challenges within heritage in the UK in particularly in regard to training and maintaining skilled staff, equality, diversity and inclusion, ensuring the public has a clear understanding of what heritage includes and specific challenges within the devolved nations. Stakeholders also note a series of challenges specific to funding, including lack of availability generally, due in part to the end of EU funding opportunities.

Despite these challenges, stakeholders also see reasons to be optimistic, citing many benefits and potential future opportunities.

Stakeholders also point to many positive things within heritage right now, including the perceived increased appreciation of heritage post-pandemic and broader political shifts that

place key challenges (such as the climate crisis and equality, diversity and inclusion) at the top of the public's and government agenda.

While public awareness of The National Lottery Heritage Fund is low, there is positive sentiment from stakeholders. However, some concerns are noted.

Although some members of the public are familiar with The National Lottery Heritage Fund on a basic level, very few understand its specific remit. Stakeholders are highly appreciative of the Heritage Fund's role in supporting heritage, and also speak positively about its ways of working. However, specific funding concerns are mentioned, as is the insufficient focus on collaboration and the Heritage Fund's current position which focuses on grant delivery rather than being a long-term partner to heritage organisations.

Looking to the future, the public and stakeholders are broadly aligned with how they want to see The National Lottery Heritage, with protecting at risk heritage and environmental sustainability being deemed key priorities.

Protecting at risk heritage is seen as the important and urgent funding priority, especially in regard to intangible and cultural heritage, as well as wildlife and landscapes. Addressing the climate crisis is also seen as critical, particularly among stakeholders.

Beyond this, both groups are aligned in placing emphasis on improving public appreciation of heritage – which is felt to be key in ensuring traditions and customs are maintained, and that heritage continues to be enjoyed by the public. Driving local benefits is also seen as high priority, to ensure that heritage boosts local places economically and culturally.

Finally, additional priorities around skills and employment, and inclusion and diversity are also frequently cited, particularly by stakeholders, as being critical for the success of heritage in the UK.

Outside of funding, the Heritage Fund is also felt to have a key role to play driving positive change across heritage in the UK.

The specific areas of work where stakeholders in particular would like to see the Heritage Fund play a greater role include facilitating networking and collaboration, sharing best practice and guidelines.

3. Public views and experiences of heritage

3.1 Summary

- **Spontaneous associations with heritage tend to focus on site-specific activities** such as visiting historic buildings, parks or gardens and visiting museums or galleries. These types of heritage activity are also those which the public are most likely to express interest in.
- Nonetheless, **interest in heritage activities is strong across the board** and when prompted, **the public do indicate interest in non-site-specific activities** including intangible and cultural heritage, and digital ways of engaging with heritage.
- Despite some areas being of less personal interest than others, **all areas of heritage tested are deemed important by the public**, with a majority saying each type of heritage is either important or very important. Only a minority amongst the public believe that the pandemic has had any effect (positive or negative) on the importance of heritage in their lives.
- **There is high awareness and appreciation of the personal and social benefits of heritage.** Preservation for future generations and connecting with the past emerge as the key benefits, but enjoyment and entertainment, improving mental health and wellbeing, and providing learning opportunities are also felt to be key.
- **Cost is cited as the top barrier to greater engagement with heritage.** Lack of time and difficulties in travelling to heritage also limit engagement with over a quarter of the UK public saying each of these is a barrier.

3.2 Understanding of and interest in heritage

Prior to any prompting or further engagement, initial discussions on heritage often focus on site-specific heritage. Qualitatively, the top mentioned forms of heritage, in order of most to least mentioned, across the sample are:

- Visiting a historic building, park, or garden
- Visiting a museum or gallery
- Visiting an ancient monument or archaeological site
- Visiting a historic city or town
- Experiencing the countryside or a natural landscape
- Among some participants from ethnic minority backgrounds, heritage is initially discussed more in terms of their own personal heritage and cultural identity

“When I think of the word heritage I just think of old buildings.”

Public, Medium engagement, 31-45

“My view on heritage was really just narrowed down to old buildings and ancient sites left intact for the public to visit.”

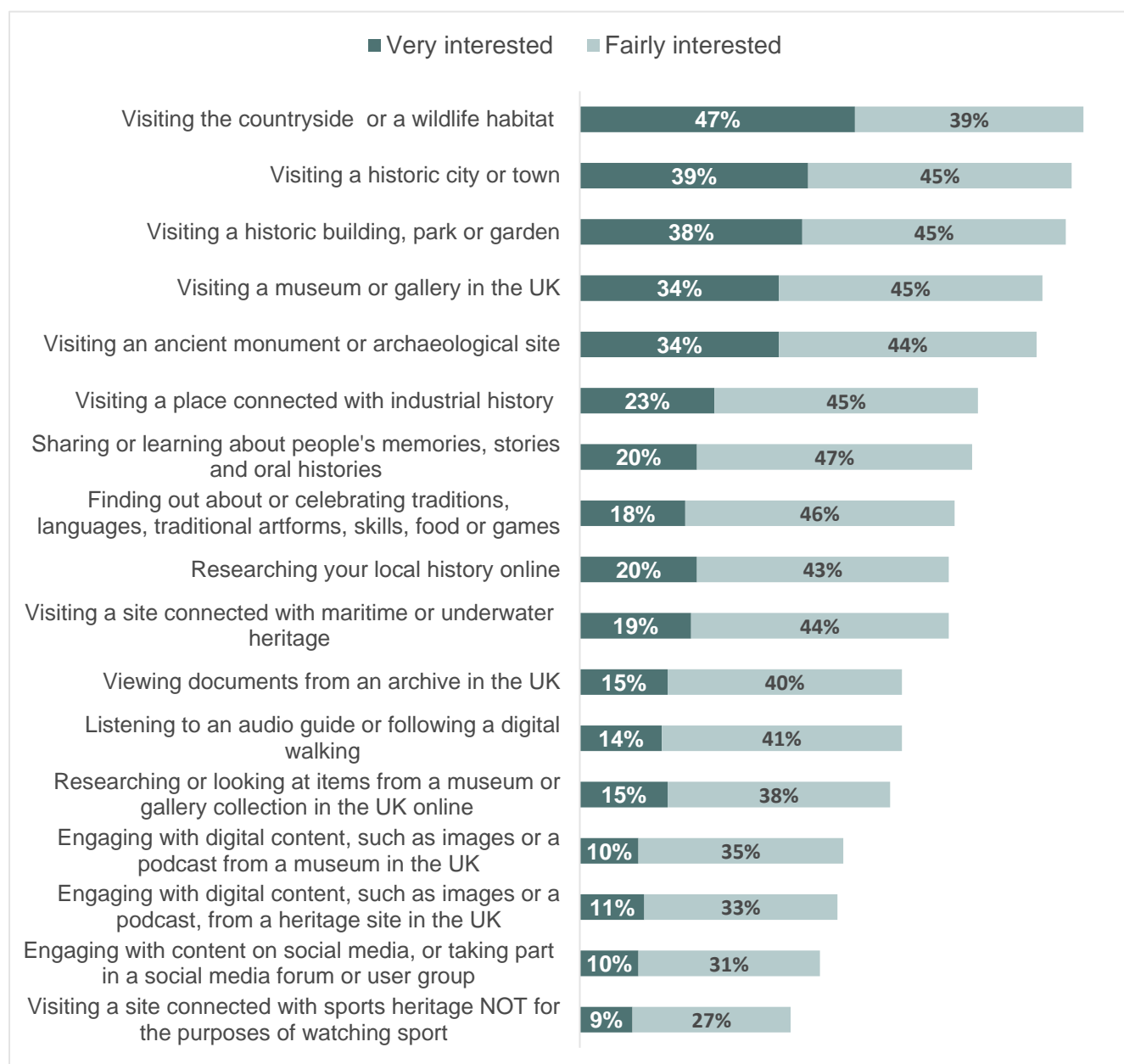
Public, Medium engagement, 60+

“I was born in Ghana and moved to the UK when I was 14. I am often asked of my heritage when people want to know where I am from.”

Public, High engagement, 31-45

These associations also generally align with the heritage activities that the public are most interested in, as shown in Figure 1 below. Overall, there is a high interest in many heritage activities, however this varies greatly by activity type.

Figure 1: Public interest in heritage activities (% 'fairly interested' and 'very interested')



Q1. How interested are you in the following activities? Base: All participants (n=2215). Please note, some answer options have been abbreviated for legibility.

Reflecting the qualitative focus on site-specific heritage, the five activities that command interest from over 75% of the UK population are:

- **Visiting the countryside or a wildlife habitat**, which emerges as the top activity of interest. A total of 87% say they are interested or very interested in this activity.

- **Visiting a historic city or town** is the second rated activity of interest with 85% saying they are interested or very interested in this.
- **Visiting a historic building, park or garden** comes closely behind with 83% saying they are interested or very interested in this.
- **Visiting a museum or gallery in the UK** is also top rated with 80% saying they are interested or very interested in this.
 - People living in London (85%) are slightly but significantly more likely to say they are interested in visiting a museum or gallery.
- Finally **visiting an ancient monument or archaeological site** is rated highly, with 79% saying they would be interested in this.
 - Men (82%) are slightly but significantly more likely than women (75%) to say they are interested in this.

Across all these top activities, although there is still high interest, participants from a DE socio-economic grade (where the chief income earner in the household performs an unskilled manual role or is not in paid work) are significantly less likely to say they are interested compared to people from other socio-economic grades. For example, 72% of people from DE grade say they are interested in visiting an ancient monument, compared to 82% in grade AB (higher managerial and professional roles), 78% in grade C1 (skilled non-manual roles and supervisory roles) and 83% in grade C2 (skilled manual roles and equivalent). Similarly, 78% of participants from a DE grade say they are interested in visiting a historic building, park or garden, compared to 86% in grade AB, 84% in grade C1 and 85% in grade C2.

These site-specific activities are deemed popular among the public for a variety of reasons. Qualitatively, many participants describe how physically visiting heritage sites can stir deep emotions. Primarily, this relates to feeling more connected to past generations, events or memories, which they feel is strongest when visiting sites in person. Even when heritage sites represent challenging past events, for example events leading to loss of life, participants describe feeling moved or humbled by the experience. Some also describe feelings of awe, amazement or even gratitude when visiting sites like this, or sites where they feel particularly connected to the past. Sites of religious significance can also prompt feelings of spirituality, and connection to a person's faith.

"I remember visiting Cornwall ten years ago and looking at the plaque in memory of the Penlee lifeboat disaster in 1981. I was very, very moved by it, such brave people."

Public, Low engagement, 60+

"I went to one of the oldest Christian worship cathedrals that exists to date. It was astonishing to see a building serving people across almost 1,500 years. It was a site to behold. You know for sure that something of importance existed here, but to see it in functional use after this long was an amazement."

Public, High engagement, 31-45

"I generally love singing Methodist hymns, but after my visit to Wesley Chapel where I saw and imagined Wesley sitting down and composing hymns, I

now feel like I am a different person – I feel I like I am now someone who can sing a hymn with meaning behind it.”

Public, High engagement, 60+

Beyond these strong emotional responses, many also simply enjoy site-specific heritage as it gives the opportunity to go for a day out, especially if they are visiting somewhere new or spending the day with family. This is particularly true when taking part in an activity that is outdoors, for example, visiting the countryside or a wildlife habitat.

“We went for a walk to see Hadrian’s Wall. It was exciting, especially for my partner as he had never been before. It was a lovely day weather-wise, and it was nice to just spend some time taking in the sights and reading about the history of it.”

Public, High engagement, 31-45

Following on from these top interests, a series of heritage activities related to intangible and cultural heritage also emerge as being of high interest to participants:

- 67% say they are interested in **sharing and learning about people’s memories, stories, or oral histories.**
 - Women (71%) are significantly more likely than men (62%) to say they are interested in this.
 - Parents of children 18 or younger are also significantly more likely to be interested in this (72%) compared to those with no children 18 or younger (65%).
- 63% say they are interested in **finding out about or celebrating traditions, languages, art forms etc.**
 - People from ethnic minority backgrounds are significantly more likely to say they are interested in this (76%) compared to White participants (62%).

These types of heritage are rarely referenced spontaneously by the public in qualitative discussions. However, when prompted, many participants not only note their own interest in such activities but are also keen to emphasise their importance culturally and societally. Participants often reference the crucial role of intangible heritage and culture in upholding traditions, connecting people to their own culture and celebrating past historical events. This emerges as being particularly important for participants from ethnic minority backgrounds, who indicate greater interest in their own family histories.

“For me personally, I wasn’t expecting language to come up, and the culture around languages – that’s what I was surprised about.”

Public, High engagement, 16-30

“The research made me rethink how diverse heritage was, and how endangered aspects are. A teacher once told me that Welsh was a dead language, that was 20-30 years ago but it’s still here.”

Public, Medium engagement, 31-45

Digital ways of engaging with heritage garner lower levels of support than more site-specific forms of heritage. Nonetheless, a number of these types of activity were of interest to over 40% of the population:

- Over half (55%) of the public say they would be interested in **listening to an audio guide or following a digital walking tour** of a historic town or city, heritage site, castle or monument in the UK.
 - People aged 16-30 (60%) and people from an ethnic minority background (65%) are more likely to say they are interested in this compared to other groups.
- 63% of the public say they are interested in **researching local history online**.
 - People in Scotland are slightly but significantly more likely to say they are interested in this, at 72%.
- 53% say they are interested in **researching or looking at items from a museum or gallery online**:
 - Men are significantly more likely to be interested in this than women (58% compared to 49%).
- **Engaging with text, image, audio, video or animation, games or podcast content** is of interest to just under half of UK adults, with 45% saying they would be interested in this if it came from a **museum**, and 44% if this was produced by a **heritage site**.
 - Interest is higher among younger groups. 61% of those aged 16-30 say they are interested in **engaging with text, image audio, video or animation, games or podcast content from museums in the UK** compared to 52% of those aged 31-54 and 30% of those aged 55+.
- A further 40% say they would be interested in **engaging with content on social media or taking part in a social media forum or user group**.
 - Interest is higher among ethnic minorities. 60% of people from an ethnic minority background say they would be interested in **engaging with content from heritage sites or museums on social media or taking part in a social media forum or user group that focuses on heritage activities, sites, topics or organisations**, compared to only 37% of White people.

Qualitatively, views on digital heritage are mixed: For many, there is simply a lack of awareness about the way in which heritage can be experienced digitally, making it less top of mind than site-specific heritage. For some participants however, there is a sense that digital forms of engagement are somehow less real or even less valid than engaging physically with historic places, landscapes or artefacts. Furthermore, some (particularly those already less engaged) lack clarity on how they would engage with these forms of heritage in a meaningful way, feeling that such activities lack the distinctiveness of an organised event or trip.

“I hadn’t considered including online viewing. I suppose I generally prefer to see these places in person but appreciate that the internet does provide the opportunity for more people to view these lovely places without actually leaving their homes.”

Public, High engagement, 60+

“Yes, we are living in a digital era, but I personally feel that heritage is truly appreciated and enjoyed in real life not sitting behind a computer screen.”

Public, High engagement, 31-45

Others are more open to the role that digital engagement can play, noting its importance in providing greater accessibility to heritage and enhancing site-specific experiences. This is something that is felt to be particularly key for some individuals during the pandemic, giving access to heritage sites that at that time could not be visited.

“Digital heritage was a God-send during COVID-19 when I couldn’t get to the sites and even now it’s good to go online and research the places before we go to them.”

Public, High engagement, 31-45

“In my ideal future there would be more technology introduced via audio description and digital walks.”

Public, High engagement, 46-60

Finally, **visiting a site connected with sports heritage NOT for the purposes of watching sport**, is the heritage activity which attracts least interest from the public, with only just over a third (36%) indicating interest in this activity.

- However, this is more popular among men, with almost half (45%) saying they are interested in this, compared to 28% of women.
- Similarly, younger audiences are more likely to be interested in visiting sports heritage sites, with almost half (49%) of people aged 16-30 interested, compared to 42% of those aged 31-54 and only 24% of those aged 55+.

Qualitatively, many participants express surprise at a sports venue being included as a form of heritage and note that it does not fit with their initial views of what heritage includes. This may then be a core reason behind low quantitative scores, with people being less likely to select this as an answer option within the context of discussing heritage activities.

“The sports heritage one – that really surprised me. I didn’t think of the UK as having a particularly heritage-based sports arena, when I think of sports and heritage I think of places like the Colosseum, rather than Wembley Stadium or Wimbledon. So that surprised me.”

Public, Medium engagement, 60+

The impact of coronavirus (COVID-19) on views of heritage

Qualitatively, there is some evidence of increased appreciation of heritage during COVID-19. This includes engagement with digital heritage, as well as an emphasis on local heritage, with many noting an increased sense of value being placed on this. Quantitatively however, there is little evidence of change from the pandemic, as shown in Figure 2.

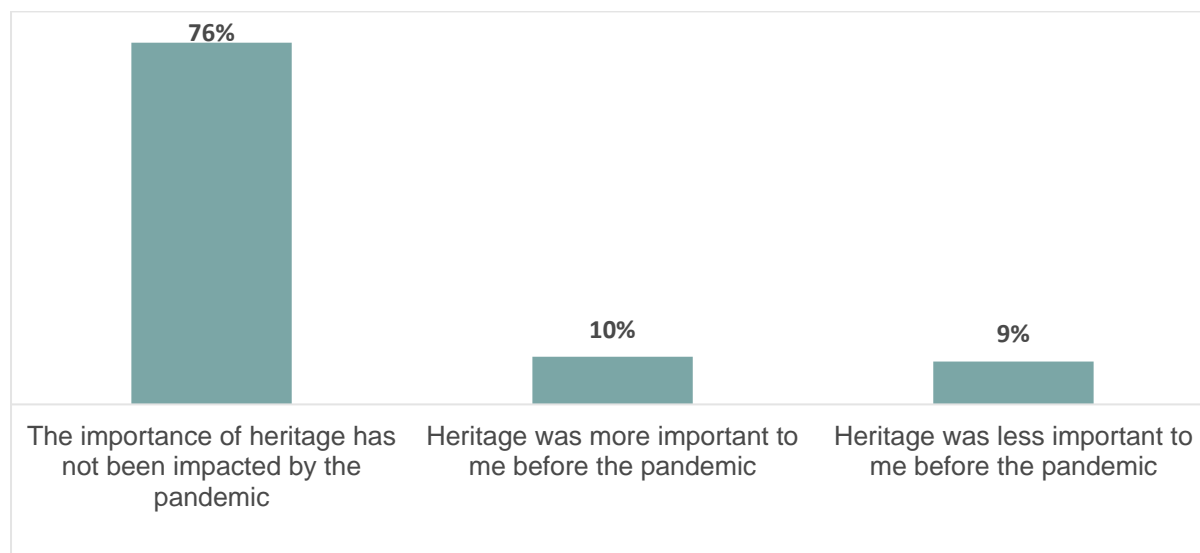
“If anything, COVID-19 has had a positive impact as it has made us explore more local areas that we didn’t know before.”

Public, High engagement, 46-60

“I had to shield during the pandemic, and it meant I could not physically enjoy any heritage activities at all.”

Public, Medium engagement, 60+

Figure 2: Impact of COVID-19 on the importance of heritage



Q4. How, if at all has the COVID-19 pandemic changed how important heritage is to you? Base: All participants (n=2215).

These findings show that:

- 76% of participants say that **the importance of heritage has not been impacted by the pandemic.**
- Only 10% say **heritage was more important to me before the pandemic.**
- Similarly, only 9% say **heritage was less important to me before the pandemic.**

3.3 Importance and benefits of heritage

Not only do the public demonstrate interest in a broader range of heritage activities upon probing, but further conversations also highlight the perceived level of importance of different aspects of heritage more broadly. This is also reflected quantitatively, with all types of heritage tested being rated as very or somewhat important by majorities of the public as seen in Figure 3.

Figure 3: Importance of different aspects of heritage: % selecting ‘very important’ or ‘somewhat important’



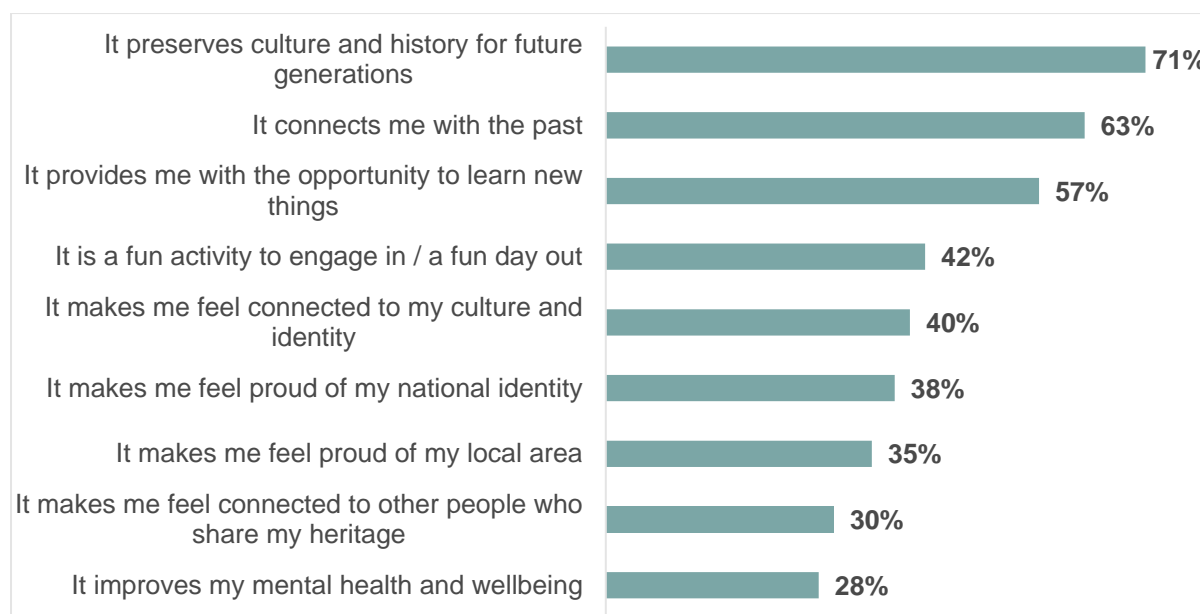
Q2. Thinking personally, how important are the following aspects of heritage to you? When answering please select based on your personal life rather than importance to society or anyone else. Base: All participants (n=2215).

The findings show that:

- **Landscapes, parks and nature** (85%) emerges as the most important aspect of heritage, aligning with visiting the countryside or natural habitat being the favourite activity among the public.
- **Historic areas, buildings and monuments** (81%) comes closely behind, along with **museums, libraries and archives** (79%). Qualitatively, these areas are often discussed not just in terms of their personal benefits, but important role in UK society too.
- **Cultures and memories** (74%) is also seen as hugely important. As noted previously, despite rarely being mentioned spontaneously, the upholding of traditions, customs, skills and knowledge is felt to be hugely important personally and societally.
- **Industrial, maritime and transport** is also deemed important or very important for 72% of the public. This is seen as a key part of UK history.
- Finally, **community heritage**, whilst the lowest ranked area is still seen as important or very important for 69% of the public. Qualitatively, this is seen as crucial in instilling local pride and bringing communities together.

Qualitatively, participants are able to discuss a wide range of reasons that heritage is important to them personally. These are discussed in detail below. In the quantitative research, even the lowest rated benefit (the role that heritage can play in improving mental health and wellbeing) is deemed important by over a quarter (285) of those for whom heritage was of at least some importance, as shown in Figure 4 below.

Figure 4: Reasons that heritage is important: % selecting 'very important' or 'somewhat important'



Q3, Why is heritage important to you personally? Please select all reasons that apply. Base: Those who said at Q2 that at least one form of heritage was very important or fairly important (n=1987)

The top benefits of heritage from the public perspective are:

- **Preserving history for future generations:** Preservation is felt to be the core reason that heritage exists, but it is also felt to deliver clear public benefits. Heritage is cited as being a key tool in ensuring that information and understanding is passed on between generations, acting as concrete evidence of our history that can be viewed and experienced by all. This is felt to be key in ensuring that historical understanding, traditions and relics remain intact to be enjoyed and appreciated.
 - 71% say heritage is important to them personally because **it preserves culture and history for future generations.**
 - This figure rises to 76% for those in Northern Ireland (76%).
 - 62% say that **preserving local and national culture and traditions** is one of their top three most important benefits of heritage.

“Heritage is very important in every part of the UK and especially for me living in Scotland, to me it is our history what we have inherited from our past and we must look after it so that we can pass it down from generation to generation, heritage is something to be very proud of.”

Public, High engagement, 40-60

- **Connecting with the past:** Heritage is also praised as a key tool in bringing history to life for the public, allowing them to better understand and experience it personally. Heritage is frequently discussed in terms of its abilities to bring the past to life, allowing individuals to connect with it on both a logical (seeing and understanding) and emotional (experiencing and feeling) level.
 - 63% of the public say heritage is important to them personally because **it connects me with the past.**
 - This figure rises for those in Northern Ireland (74%) and those aged 55+ (72%).

“It’s so important to know where you’re coming from. You won’t know how far you’ve come until you’ve seen and look backwards – it gives you a sense of belonging and understanding and makes you want to do more and think about what you yourself are doing.”

Public, High engagement, 31-45

- **Enabling learning:** Heritage is seen as a key tool for learning. This is firstly evident in terms of complimenting school and university education, for example through visiting museums or sites on topics being studied. However, it is also seen to provide learnings beyond this, for example through individuals learning about their own history and culture. On a broader societal level, the public see this learning element as crucial, noting that understanding the past can ensure better decisions in the future.
 - Over half (57%) of the public say that heritage is important to them personally because **it provides an opportunity to learn new things.**
 - This rises to 70% for people who are neurodivergent and/or have a mental health condition and to 73% for those with many heritage interests.
 - Similarly, 59% say that **providing education on local and national history** is one of the most important benefits of heritage.

“There are many ways we can learn from the past and navigate the future with this information.”

Public, High engagement, 31-45

- **Providing fun and entertainment:** Beyond the core benefits of learning, connection and preservation, the public are also keen to emphasise the enjoyment heritage brings. As heritage for many is associated with site-specific activities, it is frequently noted to be an activity that can be enjoyed with others and is specifically praised for being suitable for all ages.
 - 42% of the public say that heritage is important to them personally because **it is a fun activity to engage in / a fun day out.**

“Going to historical places with your friends and family. If you’re on holiday, it’s good fun, you can make memories.”

Public, 16 - 25

- **Inspiring pride in a local area or cultural identity:** As heritage provides understanding and connection with the past, this in turn is felt to deliver a sense of pride both in terms of local areas and broader cultural identities. Many emphasise this as being important for cultural cohesion and can also enable individuals to connect better with others through heritage.
 - 40% say heritage feels important to them personally because **it makes me feel connected to my culture and identity.**
 - This rises to 50% for Northern Ireland and 46% for Yorkshire.
 - 38% say that heritage is important to them personally because **it makes me feel proud of my national identity.**

- This rises to 56% for Northern Ireland, 47% for the North East and 46% for Wales.
- 35% say that heritage is important to them personally because **it makes me feel proud of my local area.**
 - This rises to 52% for those in Northern Ireland and 48% for Wales.
- 30% of the public say that heritage is important to them personally because **it makes me feel connected to other people who share my heritage.**

“It can help your identity, your sense of belonging, so you can have ownership over something and a sense of pride.”

Public, Medium engagement, 31-45

- **Improving mental wellbeing:** This is currently less highly valued by the public compared to other benefits. Although the potential benefits of heritage for wellbeing is mentioned qualitatively, this is the least-commonly selected benefit quantitatively (28%).
 - However, this is significantly more important for people who are neurodivergent and/or have a mental health condition, 45% of whom say this is an important benefit of heritage.

“I find heritage sites a great place to unwind, and they hugely support my wellbeing and mental health.”

Public, High engagement, 16-30

- **Economic benefits:** Although not felt to be of personal importance to the public, in discussions many also cite the economic benefits of heritage as being key. These benefits are noted to be in terms of both the provision of employment, but also income generated from visitors with many feeling that heritage sites can play a key role in contributing to the tourism of an area.

“If you are restoring something for future use and future income that means more jobs. That is a positive increase in the economy because of the more jobs available”

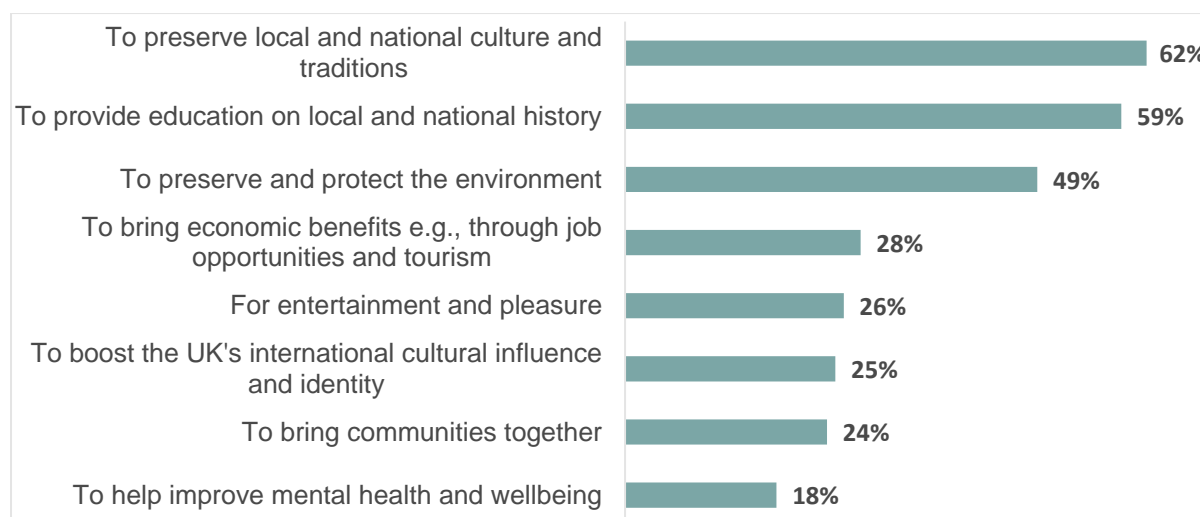
Public, Medium engagement, 31-45

When asked to select their top three from a list of broader societal benefits, the top options are: **to preserve local and national culture and traditions, to provide education on local and national history** and **to preserve and protect the environment**, as shown in Figure 5 below. This further demonstrates what the public see as the core purpose of heritage; to preserve, conserve, educate and protect.

The top mentioned barriers to participating in heritage activities can be seen in Figure 6. These are discussed further, below:

Figure 5: Most important benefits of heritage (top three)

Q5. Which, if any, of the following benefits of heritage do you feel are most important? Please select your top three. Base: All respondents (n=2215).



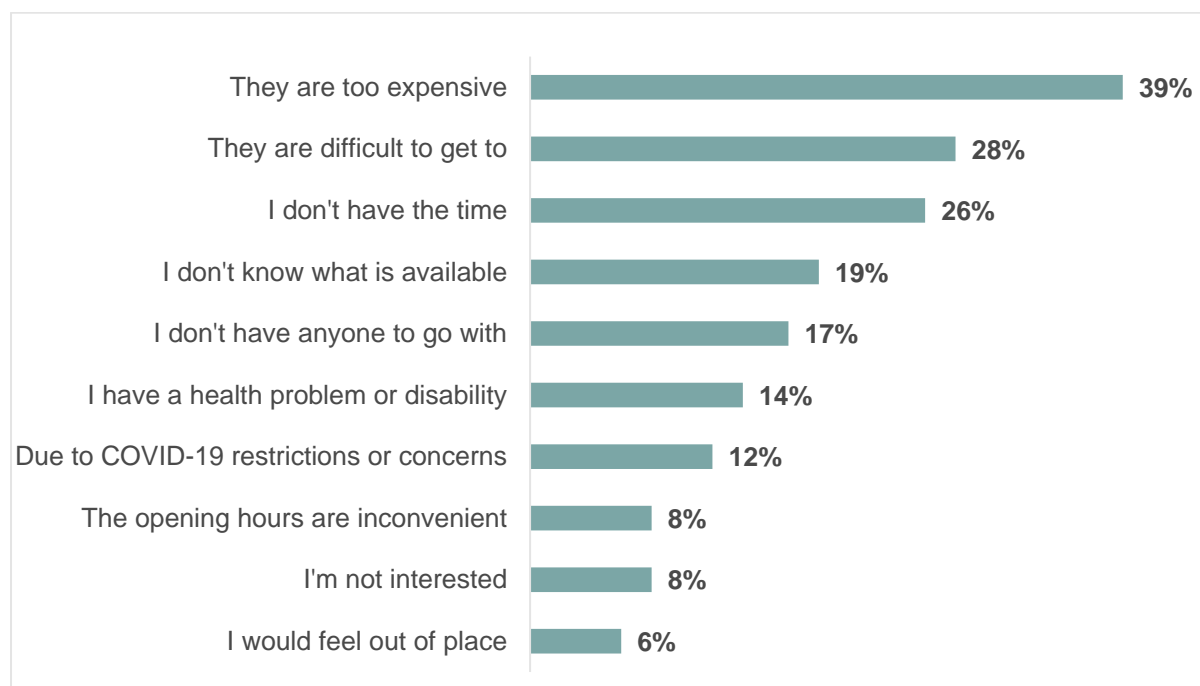
Q5. Which, if any, of the following benefits of heritage do you feel are most important? Please select your top three. Base: All participants (n=2215).

3.4 Barriers to participation in heritage

Despite positive sentiment amongst the public towards heritage, qualitatively many members of the public say that they do not engage with heritage on a regular basis. Unsurprisingly, this is most evident amongst those who are less engaged with heritage, however many across the wider public sample say they would like to take part in heritage activities more frequently.

The top mentioned barriers to participating in heritage activities can be seen in Figure 6. These are discussed further, below:

Figure 6: Public barriers from participating in heritage



Q6. Which, if any, of the following stops you from participating in heritage activities more often? Please select all that apply to you. Base: All participants (n=2215).

The top cited barriers to participating in heritage activities more often are:

Cost

Nearly four in ten participants (39%) say heritage activities are **too expensive**. Qualitatively, participants cite concerns not only about ticket prices, but the associated costs of transport, parking and food. These concerns are felt to be amplified by the cost of living crisis.

The top cited barriers to participating in heritage activities more often are:

- Those with children aged 18 or younger (44%), aged 31-54 (43%) and women (42%) are more likely to cite cost as a barrier.
- Similarly, those of socio-economic grade DE (42%) and disabled people (43%) – especially people who are neurodivergent and/or have a mental health condition (49%) are also most likely to cite cost as a barrier.

“Some of these places can be expensive to visit especially now with the rise in living costs.”

Public, Low engagement, 31-45

Access

Over a quarter (28%) of the public feel **difficulties getting to heritage activities or sites** prevent them from participating. Many associate heritage with remote or rural locations, which can feel more prone to transport difficulties. This feels particularly prohibitive for those without access to a car or reliable public transport.

- This is slightly but significantly higher for disabled people, 43% of whom select this as a barrier compared to 37% of non-disabled people.

“I’d love to visit Stonehenge at midsummer or visit more local sites around my area but since we sold our car it has made it much harder to travel to these places.”

Public, Low engagement, 31-45

Time

Another barrier for the public is the perception of **not having enough time** to take part, with over one in four (26%) participants saying this is prohibitive. When probed in depth, this is linked to a perception that heritage requires a lot of time to engage with properly.

- Lack of time is a greater barrier for parents of children aged 18 or younger (36%) compared to people with no children aged 18 or younger (23%).
- People aged 55+ are also significantly less likely to say lack of time is prohibitive (14%) compared to people aged 16-30 (33%) or 31-54 (34%).

“I think time – having the time between work, education, children, family life. It all gets in the way of what we want to do rather than what we have to do. There’s not enough hours in the day!”

Public, High engagement, 16-30

Awareness of opportunities

Almost 1 in 5 (19%) say **not knowing what's available** prevents them from taking part in heritage activities. This also emerges as a key point within qualitative discussions, with many feeling that more should be done to improve awareness of heritage activities through greater connection with local communities where heritage is based and improving promotional activities.

- This rises to around 1 in 4 for people aged 16-30 (25%) and those in Northern Ireland (27%).

“There’s no one-stop-shop for information, not a website where all of this is listed. You have to know what you’re looking for to find out these things exist.”

Public, Low engagement, 31-45

Companion

While only 17% of the overall sample feel **not having anybody to go with** stops them from participating in heritage activities, this rises to over a quarter (26%) of people who are neurodivergent and/or have a mental health condition.

- However, those aged 55+ are less affected by this, with only 14% saying this is a barrier, compared to 20% of those aged 16-30 and 19% of those aged 31-54.
- Conversely, across all age groups, people without children aged 18 or younger are more likely to feel this is a barrier (19%) compared to those with children aged 18 or younger (13%).

“I very rarely take part in heritage activity. This may be because I live alone. Were I to live with someone else, I suspect that we would pursue certain interests that would fall into the category of "heritage activity".

Public, Low engagement, 60+

Health problems or disability

14% of the public feel **a health problem or disability** prevents them personally from participating in heritage. Qualitatively, this is often a key point of concern generally, including among those who are not personally impacted. This again often stems from an underlying perception that heritage is primarily about site-specific activities, frequently located in rural or hard to reach areas, which are therefore felt to be more challenging for some individuals to access. Beyond this, some members of the public also feel that more could be done to enhance accessibility options for heritage, such as a way to engage with different senses.

- Seeing a health problem or disability as a barrier to participation rises to almost half (46%) of disabled participants. For disabled participants who have a physical health condition, this is even higher, at 54%.

“It’s not just about wheelchair access. There are many types of disabilities alluded to previously who could benefit greatly from a more sensory experience.”

Public, High engagement, 46-60

COVID-19 concerns

Qualitatively, in August 2022 conversations regarding the pandemic are relatively minimal. However, 12% of the public still cite COVID-19 restrictions or concerns as a barrier to participation quantitatively. Members of the public that do report being cautious about COVID-19 mainly do so due to being more personally vulnerable and are therefore more likely to avoid in-person activities. For these people, COVID-19 precautions (such as ventilation and outside venues) and digital options are important for accessibility.

- Disabled people are more likely to say this is a barrier (16%) compared to non-disabled people (11%), with this rising to 20% of people who are neurodivergent and/or have a mental health condition.
- People from ethnic minority backgrounds are also significantly more likely to cite this barrier (18%) than White participants (11%).

“I’d be less likely to go to sites now just to avoid being surrounded by big crowds. I had COVID-19 before and it was not pleasant, so I would like to avoid catching it again.”

Public, Low engagement, 31-45

Some barriers are not felt to be of key concern among the public, with less than 10% listing each of these as concerns. These include:

Lack of interest

A relatively low number of participants feel **not being interested** is a barrier, with only 8% of the sample saying that stops them taking part in heritage activities. This varies by age, however:

- 1 in 20 (5%) aged 55+ say this stops them taking part, compared to 1 in 10 aged 16-30 (11%) or 31-54 (9%).
- There is also a small but significant increase in the proportion of people from ethnic minority backgrounds reporting this (13%) compared to White people (7%).

“Another barrier thinking back to my own teenage years - there’s a stigma that heritage is boring and that it’s dull and not cool.”

Public, High engagement, 31-45

Inconvenient opening times

Opening hours being inconvenient is cited as a barrier for only 8% of participants. While only mentioned by a minority of participants, opening hours are often found to be at odds with their work and life schedules.

- People from ethnic minority backgrounds are slightly but significantly more likely to say opening hours are prohibitive (16%) compared to White people (7%).
- Parents of children aged 10 or younger are also more likely to give this reason (12%) compared to people with no children aged 18 or younger (7%).

“The opening hours are limiting for a lot of things. I understand the funding isn’t there to keep them open all the time, but that’s a real barrier – we literally just cannot go.”

Public, Low engagement, 31-45

Feeling out of place

Only 6% of all survey participants report **feeling out of place** as a participation barrier. This sentiment is reflected qualitatively, with many participants saying that in fact they feel heritage is open and inclusive to all.

- In line with this, it should be noted that participants from a minority ethnic background are significantly more likely to say feeling out of place is a barrier (12%) compared to White participants (6%).
- Similarly, people who are neurodivergent and/or have a mental health condition are also more likely to say this prevents them participating in heritage activities (11%) than non-disabled people (6%), as are parents of children aged 11 or younger (11%).

“Myself being from a minority ethnic background, parts of the UK don’t speak to me. I don’t know how much heritage is around for the community.”

Public, Low engagement, 31-45

4. Stakeholder views of heritage in the UK

4.1 Summary

- **Stakeholders feel that this is a challenging time for UK heritage.**
 - Broader societal issues, in particular the climate crisis and rising cost of living, are seen as key contextual challenges which heritage, alongside many other sectors, must navigate.
 - Stakeholders also identify a broad range of specific issues for those working in and with heritage, especially regarding training and maintaining skilled staff, that threaten the long-term quality and resilience of heritage.
 - Those applying for heritage funding note particular difficulties in accessing funding, due in part to the end of EU funding opportunities.
- **The range of funding challenges raised by stakeholders also illustrate a number of strategic tensions for the Heritage Fund to navigate** in its updated strategy. In particular around balancing economic contribution with supporting diversity and innovation in heritage.
- **Despite this challenging picture, stakeholders point to opportunities for heritage to grasp**, especially with the perceived increased appreciation of heritage post pandemic and broader political shifts that place challenges at the top of government agenda.

4.2 Perceived challenges within UK heritage

Broader societal challenges

Stakeholders feel that heritage firstly faces a series of challenges that are not specific to heritage alone. These are discussed below, followed by further sections on heritage specific and funding specific challenges:

The climate crisis

Adapting to and averting the climate crisis is identified by nearly all stakeholders as a major challenge facing heritage at present and into the future. This concern comes through most strongly from those working in natural heritage, who feel habitats and species have already been negatively impacted by the rapidly changing climate and are at most threat in the future. For example, the increased spread of invasive weeds into native landscapes due to warmer temperatures is cited as a key concern.

“Nature is in crisis. We have until 2030, so it is a massive priority for everybody. And yet, it is still seen as a luxury, and often because nature at risk isn’t necessarily in urban populations, it is seen as something ‘over there’ and therefore hard to connect with.”

Stakeholder, Wales

However, the challenges are by no means restricted to landscapes and natural heritage. Stakeholders working in industrial heritage (specifically transport) note specific challenges, for example, in implementing the technology required to make a coal-fired steam train like the Flying Scotsman sustainable, funding for research and development is required.

Stakeholders indicate strong concern that currently the crisis is not yet being adequately addressed across the diversity of heritage in the UK. For some, this is felt to be due to a perception that it is more relevant to some areas (both in terms of type of heritage work and geography) than others.

However, they are keen to emphasise that this is not the case, and instead the climate crisis should be viewed as a joint responsibility. There is therefore strong recognition that organisations working in heritage, alongside the rest of the UK, need to take urgent, radical action to address the climate crisis. However, a shift to sustainable business operations, such as taking action to reduce greenhouse gas emissions, is noted to be costly both financially and in terms of resources (for example, staff and time). It is also seen to require innovative ways of thinking to achieve this, and clear leadership across organisations working in and with heritage to ensure joined up thinking and action.

The public view: The public similarly express concern about the climate crisis, mostly when discussing natural heritage, and concerns about the ability to pass natural heritage on to future generations.

“You see more climate impact in the South than in the North. In the South we have these weather extremes. It creates massive damages to the fabric of the building.”

Stakeholder, England

“We’re looking at a biodiversity crisis in Scotland and in the UK. There is an emergency going on and some of the systems in the funding world are slow to react. Everything is so slow in the funding area, but we’re trying to position ourselves at the front of a climate emergency and support those who will be worst affected.”

Stakeholder, Scotland

COVID-19 recovery and the cost of living crisis

Stakeholders describe many issues caused by COVID-19, particularly for those who largely rely on visitors to heritage sites for income. The pandemic halted many projects and plans due to wider uncertainty and lockdown restrictions as well as reduced income, and there is a sense that heritage still needs to catch up to pre-pandemic engagement. However, these issues are less top of mind for stakeholders compared to the impact of the current cost of living crisis. The rising cost of living is expected to restrict engagement in similar ways to COVID-19, but stakeholders assume they will need to face this without any financial support from the government (which heritage organisations received during the pandemic).

As inflation bites, stakeholders are concerned about the public’s ability to engage with heritage, particularly heritage that requires travel or ticket costs. Stakeholders expect that the financial hardships facing the UK public will reduce spending on heritage, including donations, and will therefore directly impact their income streams. Heritage organisations will simultaneously be facing increased operational costs themselves, without any additional financial support to cover the gap.

The public view: The cost of heritage is the top barrier to participation, with the price of tickets, transport, parking and food all being mentioned. Many also express general concern about the impact of the cost of living crisis on their day-to-day finances.

“Anything that depends on giving or donations, that's got to be one of the things you knock off the list when things are tight.”

Stakeholder, Wales

Equality, diversity and inclusion

Stakeholders recognise that conversations on diversity, inclusion and accessibility have become more pronounced in recent years, increasing expectations of how organisations can better include and serve all members of the public. Despite steps to make heritage more accessible, stakeholders feel organisations can go further to:

- **Increase workforce (including volunteering) diversity.** Stakeholders feel the workforce within heritage still lacks diversity, particularly at senior levels within organisations. Stakeholders deem it critical that heritage in the UK is seen as a viable and attractive area to work, and that steps are taken to attract a wider diversity of individuals into careers. Stakeholders feel working to increase diversity within heritage will also facilitate under-served communities engaging with heritage in a meaningful and long-lasting way and want caution to be taken to avoid organisations using this engagement as a tick-box exercise for organisations to receive funding.

“The sector is so white; we are not getting the right voices in the room again and again. If young people don't see representation in the sector, they won't be incentivised to join. We are nowhere near representation across the sector.”

Stakeholder, England

- **Improve access to heritage.** Stakeholders also want to see improvements in terms of the diversity of people who engage with heritage. This firstly means improving access to heritage for disabled people, both in relation to when visiting physical heritage sites and engaging with digital content. Stakeholders also identify a need to ensure people from under-served communities feel safe and included when engaging with heritage and to celebrate a wider diversity of heritage of different communities.

“I have done a lot of work with identity, what it means to be Welsh, Welsh and Bengali, Welsh-Pakistani, working with ethnic minorities who are second or third generation immigrant. If you've just arrived in the UK and you're in a state of crisis, you're not going to go to the middle of nowhere where there's no diversity and you might expect racism.”

Stakeholder, Wales

“Our key challenge is accessibility, especially within online things. Our service users use their screen readers, but these screen readers don't

read PDFs. We've spent a lot of time and cost making sure that all digital materials are accessible; the cost of this accessibility is quite high."

Stakeholder, Wales

"A key challenge in the next 10 years is, although we've made great strides on the equality and inclusion agenda, the latest national statistics on that still show massive divides in who can access it."

Stakeholder, UK-wide

Heritage specific challenges

Beyond these broader challenges, stakeholders also identify a series of challenges that are more specific to organisations working within heritage. Below, we discuss those challenges raised which are not directly related to funding, before focussing on funding issues in the following section:

Skills, employment, and volunteering

Stakeholders perceive there to be a major challenge, and potential future crisis, in attracting and retaining skilled staff to work in heritage. This challenge encompasses three key areas:

- **Pay and progression opportunities:** Stakeholders feel that working in heritage lacks a competitive edge to many other industries in terms of both compensation and career development. This is felt to be particularly important in the current cost of living crisis which is expected to leave many unable to justify a career in heritage, leading to issues finding skilled workers to fill entry-level positions across all role types. This is particularly key for those from low socio-economic backgrounds, who are less likely to have a financial safety net than others.

"We've had a dramatic reduction in the number of EU staff and we have a real skills shortage in the sector – particularly aggravated by the cost of living crisis. It's a lower-paid area of work for the level of qualification that people have."

Stakeholder, UK-wide

- **Volunteers:** The pandemic and the cost of living crisis has made fewer individuals available for volunteering work. Furthermore, much volunteer resource consists of older people, who are likely to stop working over the coming decade or so.

"There's also been a huge lack in volunteering. Just as we were coming out of restrictions there was a huge drop of placement requests. That will probably get even worse with the cost of living crisis where people need to work to eat."

Stakeholder, Wales

- **The skills and talent pipeline:** Perceptions of low pay and a lack of career progression are particularly discouraging for potential new talent and volunteers, for

whom the entry requirements (including both qualifications and training) do not correlate to the potential financial rewards of employment in heritage. Furthermore, there is seen to be a lack of established initiatives set to encourage new talent to work in heritage. Stakeholders fear this will lead to many vacancies throughout UK heritage organisations.

“It's getting increasingly difficult getting people into roles. We need to put things into place that ensure we can have involvement that we've had in the past.”

Stakeholder, Wales

The stakeholder view: Stakeholders working in Northern Ireland are particularly worried about this skills shortage, which they feel is especially threatening for heritage in Northern Ireland where they are experiencing broader difficulties across the nation to retain talent and fill job vacancies.

“Recruitment and skills retention in the sector is a key challenge, especially when trying to compete with external salaries during a cost of living crisis. People need to be able to have viable careers but often cannot afford to work in the heritage sector.”

Stakeholder, Northern Ireland

Contested heritage / the politics of culture

Organisations working in heritage note a need to take account of contentious aspects of heritage in the UK (for example, the UK's colonial history) and tension in how this is discussed. As discussion about contentious histories and heritage become increasingly divisive and political (for example: the removal of statues, object repatriation), stakeholders identify a challenge for those working both in and with heritage, as well as funders, to think through how considerate discussions on these topics can be held. Stakeholders see this as crucial to ensure that history is told in the most truthful and honest way, as well as being mindful of not alienating any part of their community. It is also seen as key in terms of the reputation of heritage, with many stakeholders feeling that they do not want the negative attention. This is therefore seen as important to:

- Prevent hostility and negative attention around such heritage
- Tell history in a truthful way
- Avoid alienating members of the public from heritage
- Situate UK heritage within the broader global picture, which stakeholders consider of increasingly greater importance.

“Contested heritage and decolonisation isn't something that is going to go away, it'll increase, it's looking at changes in landscape. Most of us want repatriation but how does that work and what does it look like?”

Stakeholder, England

“There is a cultural challenge around geopolitics and the sense in which public organisations find themselves in a culture war. Organisations are

finding themselves in a position where they have to defend expert views and issues around inclusion in a very divided society.”

Stakeholder, Scotland

Defining heritage

As noted previously, there is currently a lack of understanding regarding the broad scope of what heritage includes and entails among the public. For stakeholders, it is noted that this may mean heritage is currently being undersold, and could lead some to assume that heritage is not for them. Some therefore feel there is a need to better define and communicate what heritage is to the public. Furthermore, for those working in and with heritage, doing so would clarify where the Heritage Fund’s remit and role in providing funding lies, and where they may need to seek alternative funding opportunities.

“It’s about the definition of heritage and what it means to people from every walk of life. Maybe there’s an opportunity here, this idea of heritage and exploring what it means and expanding that – people or organisations might not think they fit under these categories, so it’s about making sure people know heritage is for them.”

Stakeholder, England

The public view: Among the public, there is currently low spontaneous awareness of what heritage can consist of and include. Most primarily refer site-specific heritage ahead of intangible and cultural heritage, though appreciate the latter and incorporate it into their definitions of heritage when probed.

Challenges specific to the devolved nations

Geographic differences also play a crucial role in the challenges perceived by organisations working in heritage. Notably, disparity between the four UK nations contributes to the type of challenges mentioned more generally – however regional disparity is also mentioned as a specific, standalone challenge. This plays out in different ways across the nations:

- In **Northern Ireland**, stakeholders feel their current social and political context creates a more challenging context for heritage than the rest of the UK. They feel the nation has poorer infrastructure due to underfunding, a lack of political direction due to the current standstill in the Northern Ireland Assembly and major mental health crisis. These factors place heritage low down in the national hierarchy, meaning it struggles to access funding and investment

“It is a specific situation in Northern Ireland; heritage is not high up enough on the political agenda. You have to find ways of ticking boxes to make sure that heritage involves multiple things. It often has to include a mental health aspect.”

Stakeholder, Northern Ireland

- **Wales** also has a distinct perspective on challenges, emphasising that Wales has specific cultural features that make their situation different. They feel Wales has a

strong cultural identity, especially due to it being a bilingual country, though this comes with additional accessibility costs which funding often fails to recognise.

“From being a bilingual nation, we have to think in both languages what we deliver and how we engage the Welsh-speaking community.”

Stakeholder, Wales

“Sometimes a challenge with funding is to include the cost of translation into Welsh. Funding won’t always cover the full cost, which can be quite high. One or two funders will give core funding – project managers can be great but it’s more difficult if there’s no support behind you from finance directors.”

Stakeholder, Wales

- Again in **Wales**, there is also the perception that the political situation is distinct as for some, the representatives are seen to be closer to the public than Westminster. This is framed as both an opportunity and challenge, with many stakeholders claiming the key challenge is harnessing this dynamism and not wasting a crucial political moment. Brexit also poses Wales a specific problem due to no longer being able to negotiate with Brussels now and becoming more dependent on Westminster. Stakeholders also feel that the stop-start funding has been particularly prominent in Wales, making longer term heritage projects difficult.

“The funding staff of Welsh government is very reliant on the grant that Westminster government gives them, so that could get worse depending on who will lead the conservative party.”

Stakeholder, Wales

“Also the EU, you now have to negotiate with Westminster and before you had to negotiate with Brussels so that will be very interesting.”

Stakeholder, Wales

- **Some stakeholders in England** also suggest The National Lottery Heritage Fund’s regionalisation is too big and that the merging of regions has had a detrimental impact on local heritage and volunteering. Firstly, this is felt to have diluted the previously heavily localised approach that was possible in smaller regions, whereby local knowledge could be well utilised and local cultural nuances could be incorporated to work streams. Secondly, this is also felt to create logistical issues in terms of staff and volunteers needing to travel further for meetings and events.

“The merging of the regions hasn’t worked well. If you have volunteer groups applying, people have to travel a long way for meetings. This results in a loss of local connection as there are huge cultural differences between regional projects, for example differing degrees of affluence.”

Stakeholder, England

“The new regionalisation of the Heritage Fund is too big. The Midlands and East is far too big, it’s a huge administrative area”

Stakeholder, England

Funding challenges

Alongside these broader challenges facing organisations working in and with heritage, the current funding landscape in the UK is top of mind across stakeholder workshops. Heritage’s position feels all the more precarious due to a perception amongst stakeholders that the majority of funding opportunities have dried up in recent years. There is widespread dissatisfaction with the availability, access to and application of funding across the wider funding environment, including in other funders such as Arts Council England as well as The National Lottery Heritage Fund. Funding challenges that are specific to The National Lottery Heritage Fund are covered in Section 5.3.

With the exception of Northern Ireland, the funding landscape feels broadly consistent across the different nations. Stakeholders are hesitant about making broad statements on geographical differences, and stress the importance of taking a local view to funding applications given the often hyper-local nature of projects

“We are dealing with serious underfunding of local government and local heritage, we’re playing catch-up. There has been the question of whether the National Lottery Heritage Fund should be ‘substitute funding’, it should not be, but it has been. I know a number of organisations that just survive through applications for lottery funding.”

Stakeholder, UK-wide

Stakeholders note particular challenges in:

The limited availability of funding overall

Stakeholders cite frustrations that opportunities for funding have decreased in recent years, thereby increasing competition between those working in heritage and making securing funding a major challenge that absorbs huge amounts of organisational time and resource.

The UK’s withdrawal from the EU is frequently raised (particularly in the devolved nations) as an event that closed many existing opportunities for funding, as has limited grants for local government services from central government over the past decade or so. Stakeholders who work in and with listed buildings and places of worship are particularly likely to feel that dedicated funding for maintenance and repairs has reduced over the past five years or so. While there are some mentions of UK Government EU replacement funding and the Levelling Up Fund and Towns Fund, the perception that funding is limited is compounded by low awareness of alternative avenues through which to secure funding beyond the Heritage Fund.

“We’ve really struggled with funding for capital repairs to listed heritage buildings. There was a cut in funding for places of worship in 2017. I also think we’re going to lose heritage craft skills because of lack of funding. If the Heritage Fund isn’t going to be the main funder [for capital repairs to listed buildings] then who is?”

Stakeholder, Wales

The stakeholder view: Stakeholders in Northern Ireland feel Northern Irish heritage has been particularly acutely affected by the loss of EU funding. The perceived ineffectiveness of the Northern Irish Assembly means that funding for heritage is very low down in the list of national priorities. While the Heritage Fund is seen to have filled the gap to some extent, there is a sense of a greater challenge of how heritage is engaged with, valued and invested in.

Restrictive funding criteria

Many stakeholders argue that current funding criteria can be overly restrictive, forcing them to shape their projects and initiatives around applications rather than the other way around. By allowing for innovation over the course of project delivery, stakeholders feel that being able to use funding more flexibly would result in better returns on investment. For example, rather than using funding only to achieve pre-determined project outcomes, using it to hire staff or volunteers to ensure the project can be successfully delivered.

“Sometimes we write projects a certain way to guarantee funding, but we know another way would be best practice. Often, we work with a cultural consultant to see how we should go about our projects. This is so important, there really should be some funding for this.”

Stakeholder, England

“On a recent project we had to do so much work before the grant got approved. Despite schools and communities really wanting to be involved in a pond research group and getting children to look at 'Pond DNA', we weren't sure if we could afford all the pre-grant work without knowing we will definitely have the money. This is unfortunate because the best process in these projects is helping young people to develop their understanding but it's annoying that we have to pre-prove outcomes in order to secure funding.”

Stakeholder, England

Complexity of applications

Stakeholders see applications as requiring overly complex reports and evidence. While this is felt to be most true of larger funding points, many point out that even for small scale applications there are often extensive administrative requirements and reporting expectations. This falls on small, sometimes volunteer-led, applicants who report finding these requirements intimidating and time consuming. It is also noted they feel at odds with the smaller scale work they are planning.

“I've just had to spend £15,000 just getting reports, and you have to have these reports to make any applications anywhere.”

Stakeholder, England

“People are getting really bogged down in paperwork. With some funders before you start you've got so much paperwork. That can be quite a barrier

especially for small organisations or those who haven't applied before. we need to hear the stories of the small."

Stakeholder, England

An emphasis on large scale projects

Stakeholders feel generally that funding is often focused on larger scale projects that require sizable costs and resources. While these are deemed hugely important and impactful, stakeholders see immense value in supporting smaller scale projects, particularly in terms of allowing for greater experimentation. This is also tied to the above point regarding the complexity of applications, as many feel that where smaller grants are available, the application process is still time consuming and complex.

Having dedicated, smaller funding opportunities available with less intensive requirements would ease the burden of complex and lengthy application processes, as well as free up their resources for the actual implementation of projects and building internal skills.

"Larger projects will require a lot of revenue and capital, but these should not be at the expense of smaller projects that may be super important for catalysing projects that create confidence or invest in a concept, organisation and team. The gap between small and big projects is the space where iterative projects are helpful in experimenting with different styles."

Stakeholder, Scotland

Availability of funding for long-term work

Current funding cycles are felt to encourage a short-term mind-set within heritage that does not enable long-term strategic thinking. Requirements for expected annual outcomes means funding is often only available for short-term projects that offer immediate results, rather than long-term projects with the potential to have larger, more beneficial, impacts down the line. Furthermore, long running successful projects have to slow down or end entirely when the funding period comes to an end, despite the positive impacts they have. Instead, stakeholders find they need to spend time and already stretched resources creating new projects and ideas in order to receive new funding.

Stakeholders working on projects that relate to community engagement, as well as those in natural heritage, feel particularly strongly about this, as their work is often an ongoing process. For example, funding for local parks and gardens is often removed, despite the need for ongoing maintenance. Stakeholders therefore want to see funding pots available for longer periods of time.

"When you get three years of funding you might set up an activity, for example, a summer group for kids that is built up over time from 5 to 70 kids in three years. But then when the funding runs out the kids are left without these activities".

Stakeholder, England

“With Lottery funding, it always seems like it’s new projects that get the funding rather than ongoing ones, even if you’re hitting targets. I’ve had a really good project and then three years later it just stops.”

Stakeholder, Wales

Funding for ongoing work and operations

Stakeholders feel that, in comparison to other countries, heritage in the UK is not able to draw on government resources to cover their baseline operational costs. As such, they are more exposed to wider economic changes, and more reliant on charitable donations. Stakeholders are keen to see funding available specifically for organisational operations and building up capability and skills to help heritage organisations thrive in the long term. This is felt to be largely absent at the moment, and as a result many stakeholders say that they are still struggling to recover from the impact of the pandemic due to a lack of funding support.

“There needs to be a balance between funders funding new projects and core on-the-ground work. New projects seem to be more appealing than generating income to cover costs and pay staff on the ground. It would be good for funders to consider staff who are already working on projects on the ground.”

Stakeholder, UK-wide

“Opportunities provided by the Heritage Fund have been very good for employment but how will this look in the future, given the impact of losing EU funding? When some money is pulled out of the pot, where is this happening? What will it affect? How much is COVID-19 going to roll us into other crises such as the cost of living crisis? How can we recover from COVID-19 when we have so many other challenges? Now people don’t want to drive 2 hours to the causeway, they cannot afford the diesel.”

Stakeholder, Northern Ireland

A lack of joined up working and collaboration

Stakeholders identify a lack of collaboration across heritage in the UK. There is a belief that if collaboration and sharing of knowledge, resources and ideas were more commonplace, it would lead to better use of existing funding by avoiding duplication. This could also reduce competition for funding and deliver outcomes that are more cost-effective. However, such opportunities are seen as currently being missed.

“I’d like to see a stronger approach on forcing collaboration between organisations that are similar or have overlapping activities happening. Currently there are multiple organisations working on qualifications, whereas one qualification could’ve been worked on. We should streamline how resource is used.”

Stakeholder, Scotland

Strategic tensions relating to funding

Through their discussion of the challenges facing heritage in the UK, stakeholders identified a number of broader strategic tensions that The National Lottery Heritage Fund must navigate through. These include:

Commercial vs non-commercial

Stakeholders recognise that financial sustainability is key for many organisations working in and with heritage and feel strongly that funding should be used to further enhance and create new revenue streams. However, many also place emphasis on doing work for objectives beyond this. Here, stakeholders are keen to highlight the need for undergoing certain heritage work – particularly conservation – which is deemed culturally, historically, and societally important beyond commercial gain.

“Heritage has value beyond economic value, it’s social value. We don’t have the tools to measure this. We’ve been asked about helping other organisations and measuring it. People are interested in it.”

Stakeholder, UK-wide

Experimental vs traditional

Stakeholders want to see The National Lottery Heritage Fund support all types of organisations, projects, and initiatives, including new developments and more innovative work that may be riskier, but has the potential to inform ways of working that could help the wider sector (for example, a new approach for running successful community programmes in deprived areas). They identify a space for the Heritage Fund to do this through more, smaller grants. However, they stress that innovation should not be needed across all projects. There remains a desire to ensure that more established recipients of funding are still represented within the new funding strategy. This stems from a broader desire to ensure that heritage retains its current core focus, image, and purpose.

“The Heritage Fund need to be less binary - some projects need development funding. Take a punt, put money into the sector, accept some wastage, pay for people to support them.”

Stakeholder, UK-wide

“Funding should create space for risk-taking. Funding that allows organisations to fail.”

Stakeholder, UK-wide

“Smaller projects may be super important for catalysing projects that create confidence or invest in a concept, organisation and team. The gap between small and big projects is the space where iterative projects are helpful in experimenting with different styles.”

Stakeholder, Scotland

Breadth vs depth

Stakeholders deem all of The National Lottery Heritage Fund's objectives and priorities as important, and as such want to ensure that each are adequately represented through funding. However, there is also a concern about the Heritage Fund spreading itself too thinly, which could in theory lead to less effective, lower impact funding overall.

“The Heritage Fund needs to be more specific about what they do and what they don't. There is a transfer of responsibility from public towards volunteer and private focus, but this should remain public responsibility, i.e. the responsibility of public funding bodies.”

Stakeholder, England

4.3 Stakeholder views of opportunities and benefits within UK heritage

Despite recognition of many challenges being faced by organisations working in heritage and in the UK more broadly, stakeholders are also keen to highlight a series of different opportunities and benefits also being experienced. These include:

Increased public appreciation of heritage

Post-pandemic, stakeholders note a perceived increase in interest and the perceived importance of heritage among the general public, particularly natural heritage and local heritage. Halting broader travel and the reliance on local spaces during lockdowns is seen to have driven people to engage with local, especially natural, heritage as the importance of caring for local spaces rose in prominence. Similarly, the dependence on digital during lockdowns for entertainment and socialising created a previously underused means for the public to engage with heritage, both within the UK and beyond. Stakeholders see a major opportunity to act now and harness this reignited desire to engage with heritage among the public by building on the benefits they can identify in their personal lives.

The public view: Across the public research, while quantitatively there is little evidence in terms of the pandemic impacting views of heritage, qualitatively many participants note feeling additional appreciation of heritage activities during lockdown.

“Parks and green space are now more valued and COVID-19 and the cost of living crisis have encouraged people to engage with heritage and nature on their doorstep in a much more local sense.”

Stakeholder, Scotland

“In the Mourne, there has been an increase in recreation and outdoor participation as a result of COVID-19. People who otherwise wouldn't have had the habit are now participating in outdoor levels. There is definitely an increased appetite for people to get out into the national environment for people to appreciate heritage.”

Stakeholder, Northern Ireland

Greater public and political emphasis on key social topics

The prominence of key social issues on the agendas of both the public and policy makers present the chance for heritage to overcome some of its key challenges, namely:

- diversity and inclusion across the UK
- the climate crisis

While also recognised as a key challenge for heritage, stakeholders feel the increased political and public awareness on these issues will lead to more radical, direct actions. This opens opportunities for organisations working in heritage to look internally and externally to other sectors in the UK to learn from and collaborate with to overcome the challenges these issues pose.

“If diversity and inclusion is done in a meaningful way it could revolutionise our understanding of heritage and work opportunities around collaboration and partnerships. Organisations are warmer to the idea of collaborating.”

Stakeholder, UK-wide

“It’s a hook for people to question what the past was like and what that means for the future. It’s a place to think in a specific frame about experiences and livelihoods. In Norfolk we’re focusing on how we can use heritage as a place for thinking and a way of thinking”.

Stakeholder, England

The role of heritage in improving mental health and wellbeing

Stakeholders see a space for heritage, particularly site-specific heritage, to appeal to both the public and policymakers as a way to improve wellbeing, through advocating the now well-established benefits heritage can provide. For example, the drive among government and the NHS for ‘social prescribing’ initiatives offers heritage the opportunity to build engagement. Scottish stakeholders in particular were likely to raise this as an opportunity for heritage.

“We should be making use of case studies which show the link between interaction and engagement with culture/heritage and good mental health. I think social prescribing would be a good way to boost numbers and would help us engage more with politicians, who like to hear good news stories.”

Stakeholder, Scotland

The public view: Across the public, there is not yet strong recognition of the relationship between mental health and wellbeing and heritage.

The potential for technological and digital innovation

Technology, particularly digital technology, is seen as an opportunity to overcome challenges and improve ways of working, and presents an opportunity to:

- **Improve the diversity of the heritage workforce.** Utilising the shift to working online opens up previously inaccessible roles to under-served audiences. Disabled people are a particular named group who are felt to benefit from this shift most.
- **Improve collaboration across heritage (and beyond).** Digital technology and its increased use could enable heritage to collaborate with other individuals and organisations more easily across multiple disciplines of both UK and international heritage, and beyond. Easier collaboration opens the opportunity to innovate, find solutions to common problems, and share best practice domestically and internationally.

“The accelerated use of digital has been a positive change, in terms of how we collaborate and come together as a sector, to engage with new audiences, engaging people globally and locally. It helps with accessibility issues and not having people flying cross the world.”

Stakeholder, Scotland

As well as connecting and expanding networks across heritage, technological development is felt to provide an exciting opportunity for innovation to improve practices over the coming decade, especially in relation to:

- **The restoration, conservation and maintenance of heritage,** to keep heritage in a good condition for future generations or keep a record of heritage more easily.
- **Improving public access to and engagement with heritage,** both on-site and remotely. Digital technology opens up avenues where social barriers (for example, disability, socioeconomic status) may prevent visiting heritage sites, while also improving experiences of site-specific heritage.

The public view: This opportunity also comes up among the public, with participants speaking to the benefits of digital technology during the pandemic to access heritage, such as filmed site tours of old historic buildings.

“Heritage science has been getting lots of investment which links to research and development, STEM and economics. We can do more with heritage science and things relating to that.”

Stakeholder, Scotland

“The positive change in technology, it’s transforming my area (audio-visual). Particularly voice recognition and other Artificial Intelligence is making the complex material we’re uncovering much more discoverable and a lot more audience-facing than it’s ever been. There are huge opportunities going forward of really harnessing and encouraging new forms of technology in digital heritage.”

Stakeholder, UK-wide

Benefits specific to the devolved nations

Overall, most stakeholders in the devolved nations feel as though they have greater ability to shape the priorities of, and be supported by, policy makers in devolved governments than by central government. Doing so places heritage in the position to be closer to decision-making and frame initiatives in a way that will be most beneficial.

Furthermore, Wales and Scotland feel the existing priorities and initiatives from the Welsh Assembly and Scottish Government present unique opportunities that more broadly across the UK they do not have. Both Welsh and Scottish stakeholders feel the political context is more positive than the government and Westminster in particular. For example, The Race Equality Action Plan for Wales and Scotland's Place-based Approaches.

Devolved nations also feel their specific heritage gives them a unique selling point through which other opportunities can arise:

- **Scotland** has a strong existing reputation across the globe for unique, natural, community and built heritage, which they can utilise to attract tourists to the nation.

“Scotland has a reputation for natural beauty – it’s known across the world for ancient landscapes, culture, wildlife.”

Stakeholder, Scotland

“Communities and place-based approaches are really coming out in Scottish policy. There are talks around what this really means in terms of co-creation and this place-based approach, and the benefits we can get from the co-creation of heritage.”

Stakeholder, Scotland

- **Northern Ireland** can use its natural heritage to mitigate and help address the climate crisis, such as using peat bogs for carbon sinks.

“In terms of value of resilience, natural heritage has a huge role to play in the sustainability of life. For example, ensuring peat bogs are sustained is about sustaining heritage but also helping with climate change. We need to keep embodied energy in there, as opposed to just building more”.

Stakeholder, Northern Ireland

- **Wales'** distinctive cultural heritage, particularly its language, creates an opportunity to be bold and set itself apart from the other nations in the UK, particularly England.

“Wales is growing in confidence and character, we need to be more bold and ambitious. The time is right.”

Stakeholder, Wales

5. Views on The National Lottery Heritage Fund

5.1 Summary

- **Overall, public awareness of The National Lottery Heritage Fund is low.** Whilst some are familiar with the name of the organisation, very few understand the specific work that is done by the Heritage Fund.
- **Among stakeholders, there is positive sentiment towards The National Lottery Heritage Fund.** Its core role as a funder of projects and initiatives that may otherwise not get financial backing is deeply appreciated, as well as its ways of working and geographic spread.
- **However, beyond their concerns around funding more generally, stakeholders do cite some areas of reduced satisfaction,** including insufficient focus on collaboration, a potential disconnect from some areas of heritage and emphasis on being a grant deliverer, rather than a long-term supporter.

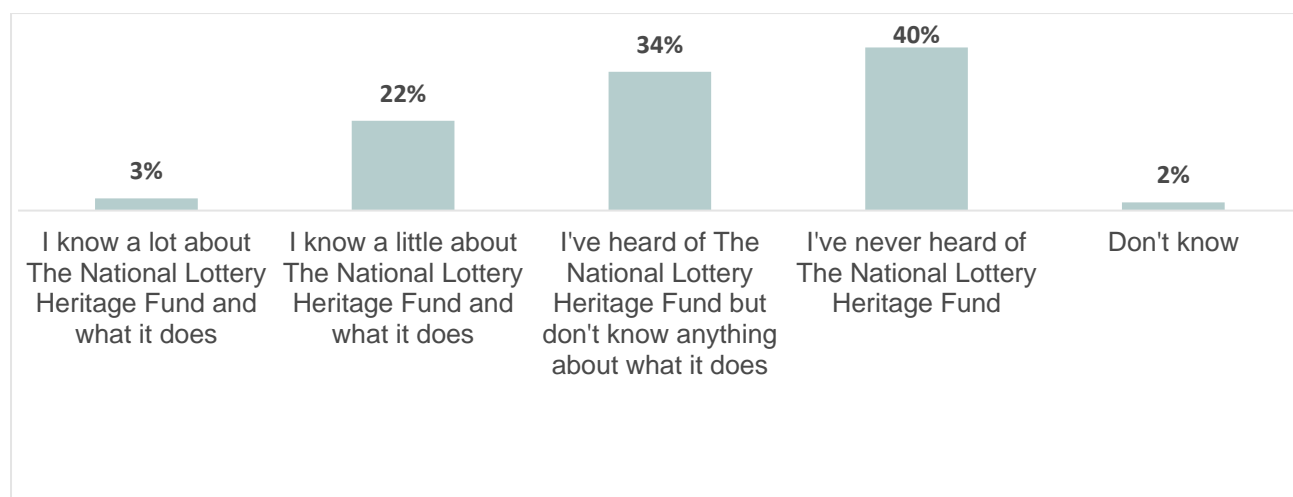
5.2 Public awareness and understanding of The National Lottery Heritage Fund

Overall, public awareness and understanding of The National Lottery Heritage Fund is low. When asked (unprompted) to name organisations or public bodies that are currently working in heritage, members of the public are more likely to cite National Trust, English Heritage, Historic England and Historic Scotland. A minority do spontaneously allude to the Heritage Fund's role or function, although this is often with a lack of precision regarding naming, for example 'national lottery'. A substantial number of participants are unable to name any organisations or public bodies that work in or support heritage.

Upon prompting, participants do claim some awareness and understanding of the Heritage Fund although this is still limited, as shown in Figure 7:

- 22% say they **know a little about The National Lottery Heritage Fund and what it does.**
- Just over two thirds (34%) say they **have heard of The National Lottery Heritage Fund but don't know anything about what it does.**
- However, the largest proportion (40%) say they **have never heard of The National Lottery Heritage Fund** and just 3% say they **know a lot about The National Lottery Heritage Fund and what it does.**
- 2% say they don't know whether or not they are familiar with The National Lottery Heritage Fund.

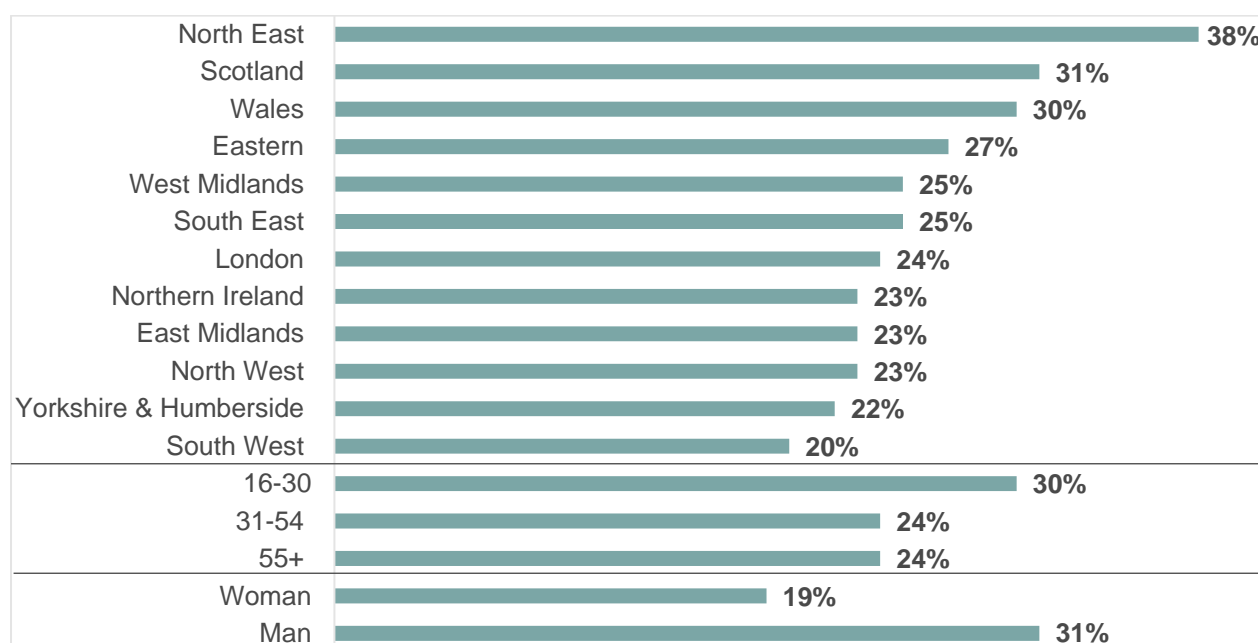
Figure 7: Public awareness and understanding of The National Lottery Heritage Fund.



Q9. How familiar are you with The National Lottery Heritage Base: All participants (n=2215)

There is some variation in awareness and understanding across different demographics, as shown in Figure 8 below.

Figure 8: Public awareness and understanding of The National Lottery Heritage Fund, by location, age and gender. NET: I know about The National Lottery Heritage Fund



Q9. How familiar are you with The National Lottery Heritage Fund? NET: I know about The National Lottery Heritage Fund; 'I know a little about The National Lottery Heritage Fund and what it does', 'I know a little about The National Lottery Heritage Fund and what it does', 'I know a lot about The National Lottery Heritage Fund and what it does'. Base: All participants (n=2215), North East (n=91), Scotland (188), Wales (n=104), Eastern (n=206), West Midlands (n=190), South East (n=301), London (n=292), Northern Ireland (n=62), East Midlands (n=159), North West (n=246), Yorkshire & Humberside (n=184), South West (n=190), 16-30 (n=427), 31-54 (n=931), 55+ (857), Woman (n=1130), Man (n=1080)

This shows that:

- Those in the North East have the highest awareness of the Heritage Fund, with 38% saying that they know The National Lottery Heritage Fund to some degree. Lowest awareness is in the South West, where just one fifth (20%) know the Heritage Fund.
- Younger participants also have higher awareness than their older counterparts. 30% of those aged 16 – 30 know The National Lottery Heritage Fund in some way vs 24% of those aged 31 – 54 and 55+.
- Men are also more likely to indicate higher awareness than women, with 31% saying they know The National Lottery Heritage Fund vs 19% of women.

5.3 Stakeholder perceptions of The National Lottery Heritage Fund

Overall, stakeholders are positive towards The National Lottery Heritage Fund both as a distributor of funding and in terms of working relationships². In particular stakeholders highlight the following as being areas where the Heritage Fund is currently doing well:

- **Funding projects and initiatives that otherwise may not receive financial backing:** Stakeholders recognise the important role that the Heritage Fund plays in supporting heritage and praise the types of work it supports through funding. The National Lottery Heritage Fund is seen as one of the few bodies left supporting heritage at scale.

“We rely on the Heritage Fund to fill gaps that the government aren’t, we wouldn’t have landscape organisations if it wasn’t for Heritage Fund.”

Stakeholder, England

- **Establishing positive working relationships with those working in heritage:** Stakeholders are also positive about their personal relationships with the Heritage Fund, noting that staff are open and supportive.

“One of the things I really liked about the Lottery Funding was the potential development, because developing those links is really difficult at the start, especially if you don’t have those connections.”

Stakeholder, Wales

“The Heritage Fund aren’t so bad because they have officers who support applications, whereas other arts [funders] don’t. You really just need someone to tell you what to do.”

Stakeholder, England

- **Being open to all geographies:** The Heritage Fund is also praised for its open for all funding approach which allows a greater diversity of organisations and individuals to apply for funding.

“The Heritage Fund has been better than other funders around regional disparities. Funding has always been open-ended; anyone can apply and

² It should be noted that many of the stakeholders that participated within the research are recipients of The National Lottery Heritage Fund funding which may influence overall favourability.

it's open for all, in comparison to the Arts Council which is more strategic, and deficit focussed."

Stakeholder, England

However, stakeholders also highlight a series of areas where they would like to see improvements from The National Lottery Heritage Fund:

- **Its role as a grant deliverer, rather than an engaged supporter or partner:** Many stakeholders feel the Heritage Fund plays an unnecessarily narrow, and overly transactional, role - limited to that of a funding distributor. There is an appetite to see the Heritage Fund act as more of a partner to those it funds – engaging with funding recipients on a longer-term basis, fully understanding their needs and challenges and crucially supporting them to ensure that the funding delivers maximum impact and value.

"Where The National Lottery Heritage Fund can do more is partnerships. Through granting them funding or adopting a more strategic approach for these organisations. More can be done around partnering up rather than just funding projects."

Stakeholder, England

- **The perceived disconnect from some aspects of heritage:** Some stakeholders feel that the Heritage Fund does not fully understand the context within which organisations working in and with heritage are operating under. This is felt particularly in relation to the timescales and factors that shape the specific challenges they face. Stakeholders feel the Heritage Fund need to better understand this in order to ensure they have an accurate grasp of realistic outcomes funded projects can achieve within grant timeframes. As such, they would like to see the Heritage Fund do more to understand the on-the-ground work.

"The Heritage Fund need to be closer to sectors so they can understand certain questions. It's about being a good funder – what makes a good charity, what makes good heritage? Most places are voluntary run and really need some help. The future looks sad for these organisations."

Stakeholder, England

"Nature is in a critical situation at the moment. Support from the Heritage Fund is great, but it doesn't enable follow on funding. Nature doesn't work in three-year cycles - most of the work is species and landscape focused and they can be decades long."

Stakeholder, UK-wide

- **Insufficient focus on collaboration:** Some stakeholders feel that the Heritage Fund may be missing out on opportunities for collaboration, particularly in terms of how it brings together different people currently working across different areas of heritage. This is primarily discussed in terms of encouraging collaboration and networking between different Heritage Fund grantees. This is felt to be especially critical given

many of the large-scale challenges currently being faced. Stakeholders would like to see people being brought together to work toward common goals and address shared challenges rather than individual initiatives and/or competition between projects.

“It’s about a collaborative approach – funding a whole environment where cultural heritage is put in as a solution. Whether that’s direct impact on buildings or population and opportunity. We need investment in a number of different aspects, so that difference can be felt by the people.”

Stakeholder, Scotland

“I think collaboration and volunteering is key - sharing knowledge, capacity and resources is key. It's not an easy task. Many organisations are trying. More help and more support is needed to be able to bring these things to fruition across networks. This is where the Heritage Fund could really help us. Everyone's got something to give.”

Stakeholder, Wales

They also identify a series of challenges that are specific to funding:

- **Availability of funding by geography:** Stakeholders feel Heritage Fund funding availability differs most by location type, with less funding available for rural areas compared to urban areas due to the smaller population and less funding per capita. While this applies across the nations, stakeholders feel this disproportionately impacts the devolved nations where there are more rural areas and smaller populations. This is of particular issue where responsibility for heritage is felt to be greater. For example, Scotland hosts a large proportion of the UK’s natural heritage which needs to be maintained, but its smaller population means there is less funding available for the extent of land. There is also an assumption that funding is more accessible in certain areas such as the South of England, whereas areas such as the North of England receive less funding.

“Scotland has a UK responsibility for national heritage. It’s just geography. Typically, money and people are in South East, nature and wildlife is in the other end of the country. Many species and habitat are lost in the rest of the country. If we lose stuff in Scotland, we lose it for everybody on the island. Funding can’t be a per capita head.”

Stakeholder, Scotland

- **Availability of funding for long-term work:** As well as being a general funding concern, many stakeholders also cite this challenge as something that is highly evident in Heritage Fund funding. There is seen to be greater emphasis on new projects rather than supporting ongoing successful initiatives.

“With Lottery funding, it always seems like it’s new projects that get the funding rather than ongoing ones, even if you’re hitting targets. I’ve had a really good project and then three years later it just stops.”

Stakeholder, Wales

6. Priorities for heritage

6.1 Summary

- **The public and stakeholders are broadly aligned in their views of what is important in terms of funding.** While stakeholders bring more clarity and detail into these discussions, they are also keen to highlight that they would like to see the Heritage Fund determine exactly how funding priority areas are delivered.
- **The top priorities for heritage are felt to be:**
 - **The protection of at risk heritage.** This applies to intangible and cultural heritage as well as wildlife and landscapes.
 - **Environmental sustainability.** For the public, this priority only emerges as a project specific priority, rather than a broader priority for heritage in the UK. However, for stakeholders it is universally felt to be critical for future funding.
 - **Improving public appreciation of heritage and driving local benefits are also seen as being high priority.** Both the public and stakeholders feel that more could be done to ensure that local traditions and customs are maintained and appreciated among the public, and that heritage works to help local places thrive economically and culturally.
 - **Additional priorities such as skills and employment, and inclusion and diversity** are also frequently cited, particularly by stakeholders, as being critical for the success of heritage in the UK.
- **Stakeholders respond positively to both the current and revised Heritage Fund objectives.** However, they would like clearer and more specific objectives and a sense of prioritisation of objectives. They also feel there is a lack of emphasis on heritage for the sake of heritage (heritage that can exist (and thrive) even if it does not demonstrate benefit and impact), the climate crisis and retention and development of skills.

6.2 Public views on funding priorities

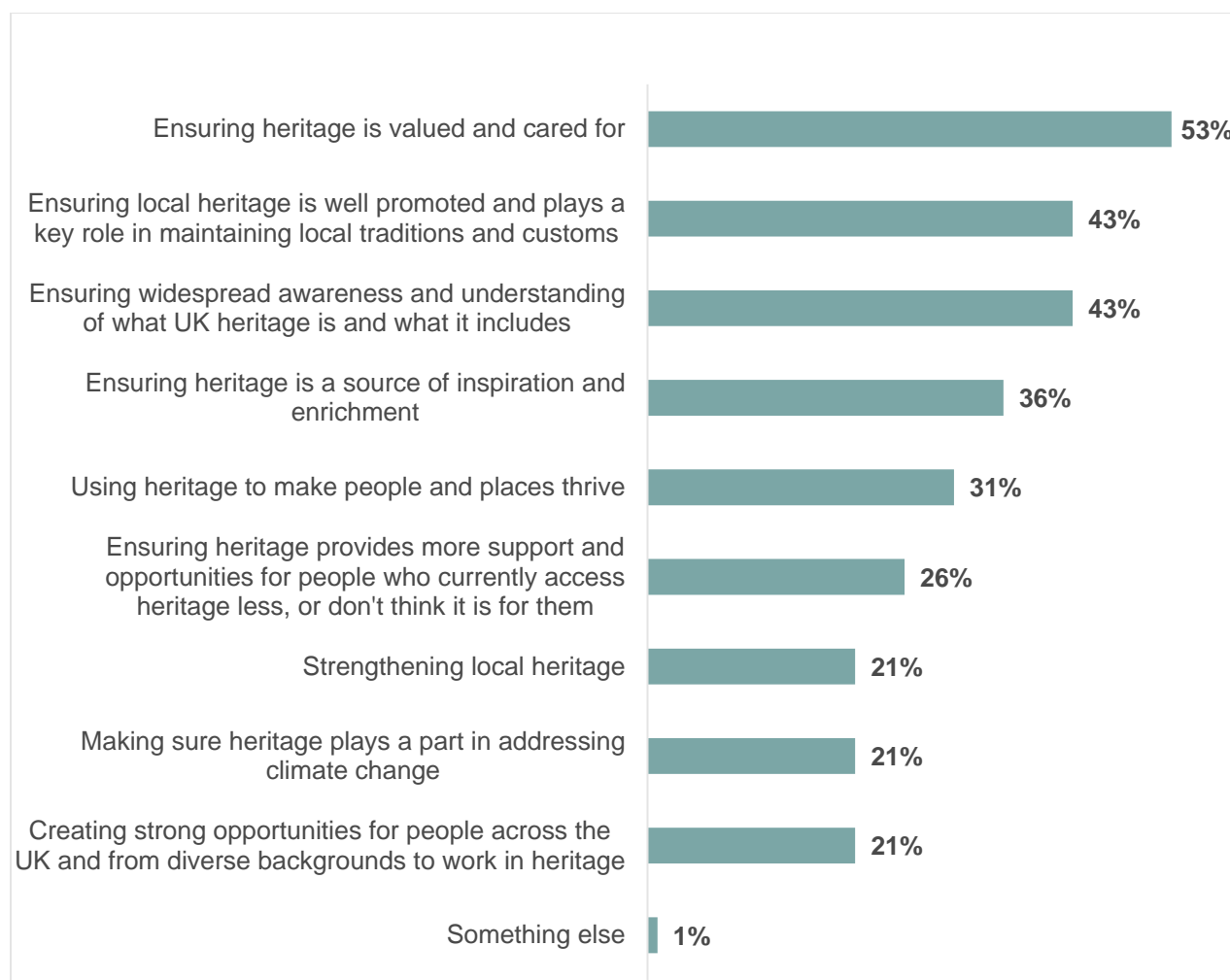
Several key priority areas were explored quantitatively with the public. These were:

- Understanding of top priorities (overall) for the next 10 years (Figure 9)
- Understanding of factors for deciding which projects should receive funding (Figure 10)
- Understanding of factors for deciding which places should receive funding (Figure 11)

Below, we discuss each of these in turn, drawing on the qualitative discussions to expand on each:

Priorities for heritage funding overall

Figure 9: Top priorities for UK heritage over the next 10 years (% selected in top 3)



Q7. Which, if any, of the following should be the top priorities for UK heritage over the next 10 years? Please select your top three options. Base: All participants (n=2215).

Looking at priorities at a broad level first, the public indicate a strong desire to see funding deliver greater awareness and appreciation of heritage:

- 53% see **ensuring heritage is valued and cared for** as a top priority.
- 43% see **ensuring local heritage is well promoted and plays a key role in maintaining local traditions and customs** and the same percentage (43%) see **ensuring widespread awareness and understanding of what UK heritage is and what it includes** as top priorities.

On a very basic level, the public are eager to see that heritage continues to be maintained and preserved, feeling that organisations such as The National Lottery Heritage Fund have a crucial role in ensuring this. Beyond this, however, there is also a clear desire to improve heritage's perceived relevance among the public. This aligns with early-stage qualitative conversations, in which many members of the public initially demonstrate a relatively narrow view of what heritage includes. Within this, the public often describe heritage as not yet meeting its full potential in terms of appreciation, despite a clear recognition of its cultural and societal impact and importance when probed. As such, there is a desire to see funding used not only to support key heritage projects, but to better promote and drive public interest in them.

“Public awareness and importance of heritage is a challenge. You can’t understand the importance of heritage if you’re not aware of it. Engaging younger people around this and trying to educate them on heritage will be a challenge”

Public, Medium engagement, 31-45

Beyond these top priorities, there are also several mid-tier priorities among the public:

- 36% name **ensuring heritage is a source of inspiration and enrichment** as a top priority.
- 31% say **using heritage to make people and places thrive** is a top priority.
- 26% say **ensuring heritage provides more support and opportunities for people who currently access heritage less, or do not think it is for them** is a top priority.
 - This comes out as being particularly important for young people. Compared to people aged 31-54 (25%) or 55+ (24%), those aged 16-30 (32%) are significantly more likely to select this as a priority.

Despite placing greater emphasis on the promotion of heritage, there is also strong recognition that this alone may not be sufficient in ensuring appeal of heritage more broadly. As such, there is felt to be a need to ensure that heritage is both inspiring and enriching. The public are eager to see work done to enhance appeal to a broader range of public audiences. There is a perceived need for funding to be used to understand the needs of those less engaged with heritage, and to think creatively about ways to attract them. This could include, for example, more interactive and immersive experiences (such as being able to explore reconstructions physically or online), which is cited frequently among younger participants as being of high appeal.

Beyond this, heritage is consistently discussed by the public in terms of its potential ability to improve local peoples and communities economically and culturally. For many – particularly those who are less engaged with heritage personally – there is often a sense that heritage should be used as a tool to drive broader improvements. This is felt to be particularly key within the context of the current cost of living crisis, which has increased concern about local economies.

“Heritage can help the local economy. In the area, there's a local history not many people know about. If organisations can get a bit of money and advertise then maybe many more people would turn up and actually visit more sites. We should target heritage that's undervalued. Most of the villages in Wales have a lot of ties with mining or shipping, for example in Swansea there are lots of docks.”

Public, High engagement, 46-60

The public indicate lower engagement with potential priorities for funding that appear to have a less direct impact on their experiences of heritage:

- 21% say that **making sure heritage plays a part in addressing climate change** is a top priority.
 - Those aged 16-30 are significantly more likely to say this is a priority (30%).

- Similarly, 21% say that **creating strong opportunities for people across the UK and from diverse backgrounds to work in heritage** is a top priority.
 - Those aged 16-30 are significantly more likely to name this as a priority (29%), compared to 23% of those aged 31-54 and 16% of those aged 55+.
- 21% say that **strengthening local heritage** is a priority.
 - Respondents in Northern Ireland are more likely to see this as a priority (30%) compared to the rest of the UK.

Qualitative discussions indicate that while the public does recognise both the climate crisis and inclusion and diversity as being of key importance, for some they are deprioritised in favour of heritage specific priorities. Here, the public note a general expectation of all organisations to be taking steps to be making improvements in environmental sustainability and in hiring practises and employment opportunities. Some also question the extent to which heritage can really impact these broad scale issues. Therefore, they instead want to see the objectives of heritage projects and initiatives to be focused primarily on heritage specific challenges. However, younger participants are more likely to cite the importance of heritage addressing broader societal issues.

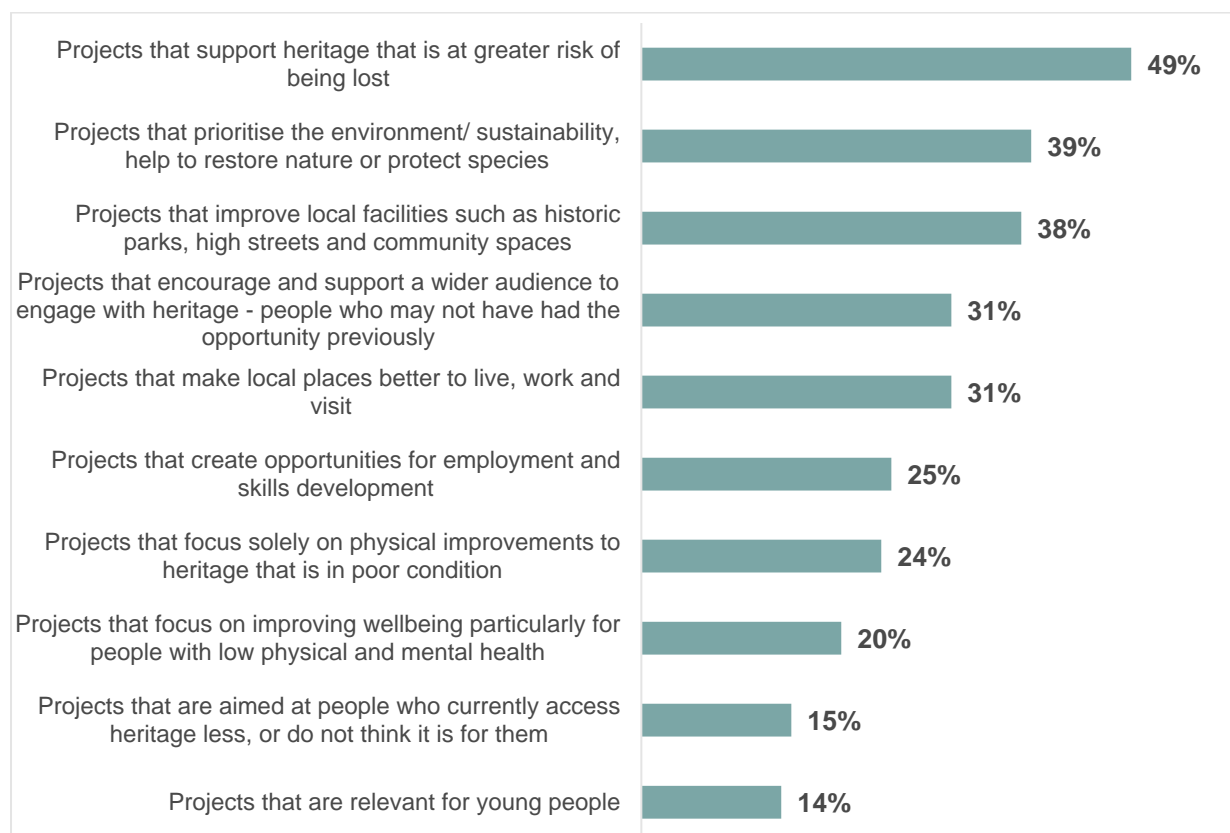
“The project related to bumblebees has limited use and is an issue way outside the hands of national heritage. It’s natural and it’s to do with climate change.”

Public, Medium engagement, 60+

Project-level factors for heritage funding

When asked about project-specific preferences the following priorities emerge:

Figure 10: Important factors for deciding which projects should receive funding



Q10. In determining *which heritage projects to fund*, which of the following factors, if any, do you think The National Lottery should prioritise? Base: All participants (n=2215).

- **Projects that support heritage that is at greater risk of being lost** is the most frequently selected project priority (49%). Qualitatively, the public also indicate strong emphasis on the importance of preserving and protecting at risk heritage to ensure that it is not lost forever. This is often deemed to be an urgent, as well as an important priority.
 - This is of particular importance for those who are more interested in heritage compared to those who are less interested (55% vs 44%)
 - This is however less of a priority among people from an ethnic minority background, with just 32% selecting this as a priority compared to 52% of white participants.

“There must be a focus on saving heritage at risk. Certain areas, if nothing is installed, then they will be ruined. We need rescue funding for those at risk, and then look at sites that are more stable.”

Public, High engagement, 31-45

- **Projects that prioritise the environment/sustainability, help to restore nature or protect species** is the second-top selected priority (39%). While addressing climate change is not felt to be a biggest priority for heritage more broadly, at a project level

the public are eager to see such initiatives prioritised. Some members of the public also note an appreciation for visibility of strong environmental practises in current heritage activities.

- Women are significantly more likely to select this than men (44% v 35%).
- White participants are significantly more likely to select this than people from an ethnic minority background (40% v 33%). Asian participants are the least likely to select this as a priority (22%).

“I have found heritage to be increasingly environmentally cautious and aware. I was at a zoo not too long ago and from the second you walked in the door, or if you were eating in the café, there were so many rules and regulations, for what you had to do with waste. I was very impressed – I might not have said that 5 years ago, but things have really progressed.”

Public, 16-25

- **Projects that improve local facilities such as historic parks, high streets and community spaces** is the third selected priority (38%). Similarly, **projects that make local places better to live, work and visit** is selected by 31% of participants. Across the public, there is recognition that heritage can be a tool to improve local areas economically, aesthetically and culturally, and as such, some place emphasis on projects that specifically speak to this potential.
 - This is felt to be a bigger priority amongst those who are less interested in heritage compared to those who are more interested (41% vs 34% respectively), likely driven by a stronger desire among the less engaged to view heritage as a tool for broader local improvements rather than recognising its standalone benefits.

“The canal-side warehouse would be a good hub for local business. It would be a good community thing, and somewhere nice for people to go.”

Public, Medium Engagement, 60+

- **Projects that encourage and support a wider audience to engage with heritage - people who may not have had the opportunity previously** is selected by 31% of participants. As noted in the section above, there is a desire among the public for the organisations within heritage to do more to engage with a broader range of by enhancing both relevance and appeal.
 - However, only 15% name **projects that are aimed at people who currently access heritage less, or do not think it is for them** and only 14% feel **projects that are relevant for young people** as priorities. While many recognise the importance of ensuring heritage is appealing to as many people as possible, some note concerns regarding too much focusing too much on new audiences ahead of those who are already interested in heritage.

“Projects that target awareness should really be prioritised. There is no point in having things that no-one knows about. Sites should inspire community participation. Heritage has to be the collective input of everyone. It should be a priority to target participation and inspiration of younger generations”

Public, High engagement, 31-45

- **Projects that create opportunities for employment and skills development** is selected by 25% of participants. While rarely cited spontaneously, when probed many participants note strong appreciation for the potential for heritage projects to improve career opportunities and skills development.
 - This emerges as being significantly more important for people from an ethnic minority background (32% compared to 24% white).

“Modernising heritage sites creates more jobs and employment. More funding in new heritage sites would make more people involved”

Public, High engagement, 31-45

- **Projects that focus solely on physical improvements to heritage that is in poor condition** is less frequently selected as a project priority, although still has support from nearly a quarter (24%) of participants. Physical improvements are inherently tied to at risk heritage, which is consistently deemed a top priority among the public. However, this specific type of project is likely deprioritised given its narrower role in comparison to the broader work of protecting at risk heritage more generally.
 - Those who are more interested in heritage are significantly more likely to select this (compared to 21% of those who are less interested). This group has greater appreciation for such improvements, whilst other members of the public see it as having limited appeal and relevance.

“I’d like to see more money invested in restoring older buildings and bringing them up to their full potential. The dancehall in Belfast, it’s been lying there empty for years and it’s falling apart. I think it would bring people together and bring with it a sense of pride.”

Public, 16-25

- 20% select **projects that focus on improving wellbeing, particularly for people with low physical and mental health** as a top priority.
 - People aged 16-30 are significantly more likely to select this (28%) compared to 31-54 (22%) or 55+ (14%). Qualitatively, this group place greater emphasis on the importance of wellbeing more generally, particularly in terms of mental health.

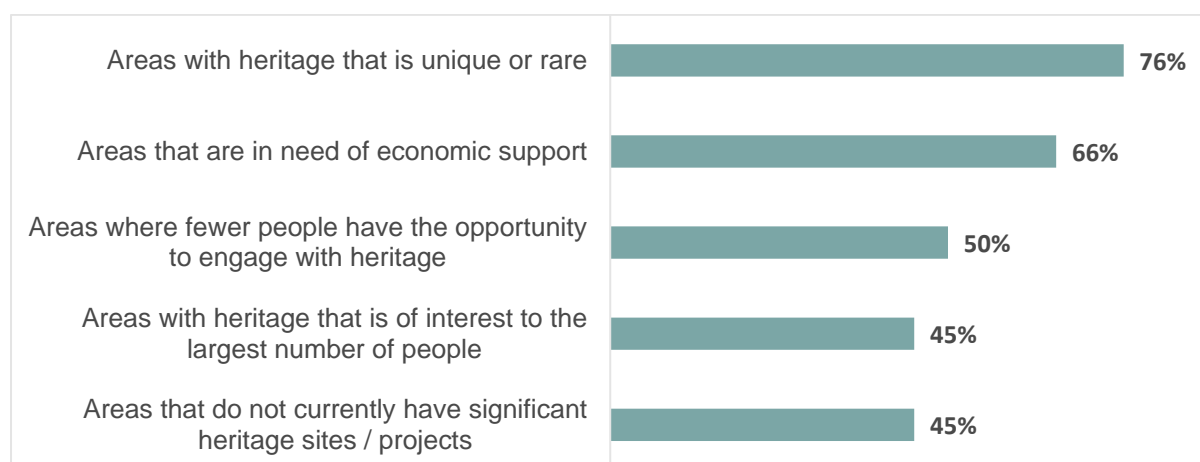
“Heritage has great health benefits. It encourages people to get out, get some fresh air, exercise. In terms of the mental side of it, it’s free learning in a way. You read the plaques, you talk to people about it, it stimulates your brain.”

Public, Medium Engagement, 46-60

Factors which should inform decisions around which places should receive heritage funding

When thinking specifically about funding in terms of place, the public tend to prioritise unique or rare heritage first and foremost, followed by considerations around the places that will most benefit from the economic benefits that might flow from heritage funding.

Figure 11: Important factors for deciding which places should receive funding



Q11. Which of the following factors, if any, do you think are most important in deciding which places to fund heritage projects? Please select your top three. Base: All participants (n=2215).

- The public are most likely to say **areas with heritage that is unique or rare** should be prioritised (76%). Qualitatively, members of the public see unique heritage as both a source of pride and a way to draw in tourists, both of which are identified as an important benefit of heritage by over a quarter of the general public (see Section 3.3). Participants often describe examples of unique heritage in their local area, and express a desire to see this celebrated. This also aligns with the public emphasis on projects where heritage is at risk of being lost, leading to a strong desire to ensure that funding protects key heritage sites so they can continue to be enjoyed by future generations.
 - People aged 55+ are significantly more likely to feel this (83%) compared to those aged 31-54 (74%) or 16-30 (67%).
 - Those in Northern Ireland are also significantly more likely to say this is a priority (85%) compared to the overall sample (76%).

“We are very blessed to live in the UK as we have centuries of history unlike a lot of new countries and I think that’s why we get so many overseas visitors coming here to see our heritage and history, as it’s so unique.”

Public, Medium engagement, 46-60

- Second to this is **areas that are in need of economic support**, with 66% selecting this. As previously reported, the public see heritage as having the potential to provide an economic boost to local areas and as such, place emphasis on using heritage as a tool to deliver these wider benefits.

“[Heritage] can become self-sufficient - it can bring jobs and economic benefits to the area. For me that’s a really big one.”

Public, Low engagement, 30-45

- In terms of whether funding should target places where people are already engaging in heritage, views are mixed. Half of participants (50%) select **areas where fewer people have the opportunity to engage with heritage** and 45% select **areas that do not currently have significant heritage sites / projects**. On the other hand,

45% select **areas with heritage that is of interest to the largest number of people** as a priority. Participants in the qualitative research add further nuance to these views. They feel it is important that everyone has access to heritage so that people are able to experience the various benefits that come with engaging with heritage. However, others approach this question from a more practical lens, and feel catering to places that can attract larger audiences will ultimately generate more engagement, income and benefit the most people.

- Women (53%) are significantly more likely than men (46%) to say areas where **fewer people have the opportunity** to engage with heritage should be prioritised. Conversely, men (49%) are significantly more likely than women (41%) to say that areas with heritage that is **of interest to the largest number of people** should be prioritised.
- Similarly, those aged 16-30 are significantly more likely to feel funders should prioritise projects in areas with heritage that is **of interest to the largest number of people** (52%), compared to those aged 31-54 (41%) or 55+ (46%).

“The money that the Heritage Fund gets should be distributed equally and fairly between the cities and boroughs in order to ensure that there is equality taking place.”

Public, Medium engagement, 16-30

“The wider the audience the more revenue can be generated funding and saving more heritage sites/events.”

Public, Medium engagement, 60+

6.3 Stakeholder views on funding priorities

There is a great detail of alignment between the priorities laid out by the public and stakeholders. Unsurprisingly, the latter group are able to bring more detail and depth to these discussions in terms of why these areas are important.

Interestingly, stakeholders generally refrain from expressing how exactly priorities should be delivered upon (for example: the types of project, funding models and interventions that are most likely to deliver against these priorities). Instead, they tend to feel that The National Lottery Heritage Fund should lead on this, based on data and evidence they have collected on the state of heritage. Beyond this, stakeholders are also keen to emphasise that recipients of funding should not have to demonstrate action in all priority areas, and instead should be focused on one or two key areas.

Stakeholders highlight the following priorities for funding:

Protecting unique or rare heritage that is at risk of being lost

As seen among the public there is a strong desire for funding to ensure that heritage is kept alive or intact in the UK. This is felt to be at the core of what heritage, and The National Lottery Heritage Fund, is about. In discussions, stakeholders highlight the role of the Heritage Fund in supporting unique or rare heritage, particularly in areas of the country or

types of heritage that are currently overlooked. Stakeholders raise this particularly in regards to:

- Intangible and cultural heritage (eg: traditions, stories)
- Wildlife and landscapes

Stakeholders feel it is most important for the Heritage Fund to prioritise at-risk heritage when there is no alternative funding available from other organisations or public body.

In discussions about this funding area, stakeholders state that The National Lottery Heritage Fund should be an authority on what is most deserving of being preserved. They recognise that funding cannot save all areas of heritage, and difficult decisions must be made about where money is best spent. This should be determined based on both the feasibility and cost of saving certain heritage, assessed against the impact of preservation across an array of potential factors (cultural, financial, societal).

“It’s often about distinctiveness, a place of heritage being somewhere to go – not just a project that can be done anywhere else, but one that builds on the unique relevance of that place.”

Stakeholder, Scotland

“It links back to metrics and where could we get the most impact. It is important that whatever the strategy is, we pick one thing over the other. We need to allow for that. It’s about where can we make the most effect.”

Stakeholder, England

“How do we decide what we want to be here in 50-100 years time? What risk is a tangible output and how can we fund that? We’ve got to think about what we’re preserving. It goes for physical buildings but also for archives, records and the skillset of sector employees.”

Stakeholder, Wales

The public view: Preservation of at risk heritage is also a key priority for the public. However, they are more likely to indicate concern for well-known or big ticket site-specific heritage, which they fear could be at risk of under-funding. Stakeholders instead are more likely to highlight the importance of under-celebrated heritage that is at risk of being forgotten, including, for example, traditions from cultures that are increasingly assimilated.

Supporting environmental sustainability and responding to the climate crisis

While the public are more likely to discuss environmental sustainability in terms of individual projects, stakeholders refer more broadly to a need for organisations working in and with heritage in the UK to be addressing the climate crisis. This is seen as particularly central to work around landscapes and wildlife, but also should be incorporated into all other heritage projects. There is therefore an expectation that Heritage Fund responds to this in several different ways through funding including:

- Funding climate crisis specific work, such as special interest groups around climate change and reconstructing past environments via, for example, oral history groups or looking at environmental remains.
- Providing funding for research and development into how heritage can become more environmentally friendly, particularly those areas of heritage which contribute the most to the climate crisis (for example: transport powered by coal engines).

“The timing of conservation species is really urgent. We don’t have time for paperwork and reviews as nature is depleting. Also, with short-term projects – for example a three-year project - it is impossible to monitor fully whether things work or don’t work. We don’t have the funding to gather baseline data and we have no funding to do post-project analysis. It’s just funding for the project data so we can never understand the impact of our work.”

Stakeholder, Wales

“There is a real untapped resource in memory around climate change which isn’t being recorded. There are a lot of changes taking place in landscape which probably shouldn’t be taking place if you talk to people in those communities for generations ... you can use memory to better understand landscapes.”

Stakeholder, UK-wide

“Looking at the climate emergency, not all projects will have that much people engagement. Some projects may help pollinators or stop flooding. Maybe there should be a focus on natural heritage as opposed to just people-focused heritage.”

Stakeholder, UK-wide

Making improvements to the wider heritage ecosystem, including skills development, staff and volunteering

Challenges relating to staffing and specifically volunteering are well established among organisations working in heritage, with pre-existing issues being exacerbated by Brexit, the COVID-19 pandemic, and the cost of living crisis. Therefore, stakeholders would like to see funding used not just on projects that can provide employment, but in terms of broader initiatives that promote skills development and sustainable careers (with real longevity) in the face of various changes organisations face in the coming years, including new digital technologies. They are also keen to highlight that this should extend to freelancers, as well as salaried workers and volunteers.

There are two key components of this:

- Attracting the next generation of talent to heritage
- Supporting those who are already working within it

With this in mind, stakeholders expect funding to be available for projects that offer opportunities for progression, provide stable employment and enable on-the-job skills

development to ensure those working in the sector can successfully deliver their role. However, the Heritage Fund is also seen to have an important role to encourage all projects to use funding to maintain skilled staff and ensure adequate compensation for time. For stakeholders, broader financial resilience, particularly among smaller organisations, is needed to enact this in the long-term.

“The skills initiative program was great they were finding posts in museums which were in need of more people working in special collections care or community skills initiatives which were for skills within communities. This would provide employment opportunities for people and short-term posts can become stepping stones to longer-term posts.”

Stakeholder, Northern Ireland

“There is an area around skills development and understanding what it is. The professionalisation of the sector is important, we have lost a lot of specialised skills in the sector. The Heritage Fund has a role to do that insight work around sustaining and providing heritage for the future.”

Stakeholder, Scotland

“Try to build groups from the ground up. You should have enablers instead of monitors. Specialists are people who have value, they are not a cost. This would build capacity in the sector.”

Stakeholder, UK-wide

“Core funding to support applications and then continuation of funding. The Heritage Fund often say they don't want to fund long term to ensure sustainability, but we can't always find funding. It's that money is tight. The application process is in-depth and time consuming and it is difficult to organise people and gather people together in time to get applications in.”

Stakeholder, UK-wide

Ensuring equality, diversity and inclusion is at the heart of heritage

These topics are felt to be both a key challenge in heritage and a future opportunity, and therefore are unsurprisingly seen as a key priority for funding. Stakeholders would like to see heritage in the UK be more diverse both in terms of workforce and the types of heritage projects and initiatives available.

Funding should therefore:

- Create new employment opportunities, particularly for underserved communities.
- Be used for a wide range of types of projects, representing different cultures and backgrounds, including projects on the heritage of underserved communities that may have previously been overlooked.
- Ensure that recipients of funding gather clear data and evidence on KPIs relating to equality, diversity and inclusion to monitor progress.

- Ensure people from diverse backgrounds feel safe and welcome when visiting heritage sites, such as providing cultural awareness training or resources for staff and volunteers.
- Targeted towards local grassroots organisations that represent underserved communities that may have not yet applied for funding through Heritage Fund.

This also means it is critical for Heritage Fund to assess its wider funding portfolio, to ensure equality, diversity and inclusion as a whole, rather than just within specific funding projects.

“Sometimes engaging with deprived areas / people from minorities is treated as a tick-box, rather than a legacy aspect to create a continued connection between that community and the place of heritage. Asking people from those different communities what they need and want, for example, ethnic minorities, disability groups, is important.”

Stakeholder, Wales

“For accessibility, there is now a disability rights taskforce [in Wales]. They support policy for disability. Comparatively, it’s a real positive and really helps in terms of the future; this helps by improving access to heritage, for example, accessing the beach if you’re a wheelchair user.”

Stakeholder, Wales

Improving public access to, appreciation of and engagement with heritage

Many stakeholders are keen to avoid a need for heritage to prove its worth through evidencing mass engagement with it or the secondary benefits it provides. However, on a very basic level, stakeholders recognise that for heritage to continue to thrive, there must be an audience base to engage and experience it. Furthermore, it is critical that heritage is available or accessible to any member of the public. Therefore, making improvements to public appreciation and engagement is felt to be a key priority to ensure heritage feels open, accessible and relevant to all those who are interested in it.

Stakeholders want to see the Heritage Fund consider how funding can be used to open up heritage to more people. In particular, stakeholders consistently discuss the importance of being open and appealing to younger generations, to ensure heritage can continue to thrive in future years, both as visitors and as part of the workforce as well as a need to ensure physical accessibility.

Areas stakeholders suggest the Heritage Fund should consider include:

- How to expand recognition of different types of heritage beyond visiting historic buildings, monuments and museums.
- How to build appreciation through the heightened importance of nature and local communities post-pandemic.
- How to use heritage as a source to learn through, particularly among the younger generation. This was especially raised in relation to learning about other cultures and communities.

- How to overcome barriers that put people off engaging with heritage, particularly through the increased use of digital channels for engagement.
- How to ensure all heritage is accessible, both in relation to the physical accessibility for visitors of heritage sites as well as any digital resources (both on-site and remotely online).

Furthermore, stakeholders would like to see funding be used to better promote and share the benefits of heritage. Some feel for example that its impact on mental health and wellbeing is a currently under-utilised selling point that could be relevant for a broad range of individuals.

“The NHS crisis could generate more interest in green social prescribing and alternative health methods. Funding these could be a more cost-effective method than medication.”

Stakeholder, Scotland

“A key challenge in the next 10 years is although we’ve made great strides on the equality and inclusion agenda, the latest national statistics on that still show massive divides in who can access it.”

Stakeholder, UK-wide

Driving local benefits

While the importance of the economic benefit of heritage is debated among stakeholders, there is widespread recognition and appreciation of the benefits it can bring in terms of providing entertainment, enjoyment, learning and cultural value to local areas and the communities within them. Therefore, ensuring that local areas fully reap the rewards of heritage is felt to be a key priority.

Here, stakeholders are keen to emphasise this means taking the time to truly understand the needs and views of the places that may be targeted by heritage funding. They seek to avoid simply parachuting heritage into an area and expecting engagement. Funding local and grassroots organisations that understand the nuances and context of local areas is seen as an important way in which community heritage projects can be successfully delivered. This means the Heritage Fund should trust local knowledge and focus on building heritage from the ground up, funding those projects that collaborate with and draw on local expertise. However, stakeholders stress that engagement alone should not be a requirement across all projects, and that instead this applies more specifically to projects where engagement and outreach are central components.

It also means the Heritage Fund should avoid making shortcuts and assumptions about certain geographies, and instead should adapt a hyper local approach.

“There is a need to trust the local knowledge of the people who apply. In South Buckinghamshire, we were told we weren’t deprived enough. There was a blanket assumption about the area when there are pockets of severe deprivation.”

Stakeholder, England

Supporting technological and digital innovation

As previously noted, stakeholders recognise technological and digital innovation as being a key opportunity for heritage. This is felt to be key not only as a tool for preservation, but as a way to better connect with audiences across the UK and internationally.

To harness this opportunity, increased investment is required to facilitate the use of digital technology, as such moves are felt to be expensive, often resource heavy and in need of specific skills and expertise, which are not consistently present across heritage organisations. Funding here could revolutionise both the preservation of heritage and engagement with heritage, with particular desire to see funding to:

- Digitalise archives, records and materials (both for preservation and to increase access).
- Improve the services supporting heritage (for example, organisations' websites)
- Improve experiences for visitors of site-specific heritage (for example, using technology to offer tools that assist those with additional needs – like video or audio guides – and/or provide a more interactive experience)

“Grants to digital improvements on websites. It's rapidly moving on, all of us need to catch up. It should be considered on a periodic basis.”

Stakeholder, England

“When I worked with the archive sector on Heritage Fund funded projects with Black Lives Matter, there was not so much digitalisation. They were focused on hidden histories. With digital output, you need an added investment. Pair it with an organisation, larger legacy questions about funding. It could be long-term funding; it can be that it would connect with a diversity and community initiative but doesn't have the structure in place. Digital is very expensive.”

Stakeholder, England

6.4 Stakeholder feedback on The National Lottery Heritage Fund current and draft priorities

Stakeholders were shown stimulus of The National Lottery Heritage Fund's current and draft priorities for feedback³. Overall, they respond favourably towards both the current priorities and principles and the revised objectives.

Current priorities and principles of the wider current funding framework

Broadly, stakeholders feel the existing priorities continue to reflect the current context and important issues facing the heritage, particularly in regards to heritage that is at risk of loss,

³ See Appendix for stimulus shown to stakeholders

damage or neglect and community heritage. However, stakeholders have specific concerns they are looking to see reflected in the updated priorities:

- On **heritage at risk**: Stakeholders agree this is of particular importance but want to see critical thinking about what is considered at risk to avoid funding being spread too thinly. Stakeholders feel that a clear definition for both funders and local governments, who are also seen to have responsibility for maintaining local heritage at risk, would help ensure The National Lottery funding for heritage is used appropriately.

“The priorities seem about right but addressing risk needs to be addressed across all of them. The scale of the stuff that is at risk I think is larger than we believe. It would be good to know if the Heritage Fund know what is actually at risk.”

Stakeholder, UK-wide

- On **inclusive heritage**: Stakeholders feel the context around heritage has shifted somewhat due to more contested histories emerging from conversations around colonisation. They expect this context to be recognised within inclusive heritage, embracing the differences in how heritage is discussed and celebrating the full diversity of heritage that exists within the UK.

“For us to move to different audiences and understand their language will take time, resources and complete utter commitment. To change, I need help to ask questions differently, to engage with organisations who don’t think they deal with heritage.”

Stakeholder, UK-wide

Furthermore, the existing priorities are felt to be missing some important issues, most notably:

- **The resilience of organisations working in heritage**. In the post-pandemic and cost of living crisis context, the priorities do align with stakeholders’ expectations on the role the Heritage Fund needs to adopt to support those working in heritage through the coming recession as well as major skills crisis.

“I feel we’re in a paradigm shift where a lot of institutional knowledge is at risk as well. I think many organisations might need to be supported. Supported through a challenging paradigm shift period, making sure that they’re relevant for the future, sustainability is built in. Reckoning with the real-world circumstances.”

Stakeholder, Scotland

“Specific funding towards supporting smaller heritage voluntary organisations is needed to recover from COVID-19, to look at ways of funding to support volunteers with cost of living to continue to be involved in the sector.”

Stakeholder, Northern Ireland

- **The climate crisis.** No explicit mention of this within the priorities is of concern considering the urgency in which it needs to be addressed. Stakeholders expect the Heritage Fund to be considering how to mitigate against the climate crisis across all areas of its work.

“Climate change has to be mentioned. Especially given the Heritage Fund as a lobby, it would be good for climate change sceptics.”

Stakeholder, Northern Ireland

Current outcomes

Stakeholders are familiar with these outcomes, and they receive high levels of support as important goals for organisations working in and with heritage to aim for. Stakeholders feel particularly positively about the outcomes relating to the resilience of heritage organisations and positive impacts on people, especially in regards to wellbeing and improving places, as vital for the long-term endurance of heritage. The only important outcome felt to be missing was around the need for heritage to mitigate against the climate crisis.

“Greater wellbeing is so key. Particularly post COVID-19, thinking what we're here for, if people aren't better off after using a heritage then what are we here for?”

Stakeholder, England

Beyond this, stakeholders struggle to comment on the outcomes in detail due to the lack of defined measures against these outcomes. They feel these are needed to both assess whether these outcomes are realistic as well as how far funding for heritage from The National Lottery has successfully contributed to these outcomes. Stakeholders want the Heritage Fund to evaluate this to determine the suitability and effectiveness of these outcomes. A couple of stakeholders express further concern that people may be discouraged from applying for funding if these measures are not clear, particularly for those working independently or in smaller organisations.

“Being inclusive is obviously a good objective and outcome but this feels very vague – how would they measure that a wide range of people would be involved?”

Stakeholder, Wales

Furthermore, opinions diverge slightly dependent on the area of heritage stakeholders work with. This came through most notably in discussions on the following outcomes:

- **A wider range of people will be involved in heritage.** Stakeholders across the board agree this outcome is of high importance, and feel heritage in the UK has improved, diversified and become more inclusive as a direct result of having this outcome. However, it can present a challenge to evidence in funding applications, particularly for projects focused on maintenance or restoration of buildings and nature.

“The mandatory objective is interesting within a Northern Ireland context. I'm unsure as to what 'being involved' means.”

Stakeholder, Northern Ireland

“For instance, the project that I'm involved in at the moment, the impact on the community is marginal. The outcomes are fine, but I think the weighting needs to be different depending on what sort of heritage project you're involved in. I think that some organisations ought to be allowed to say, 'We will seek partners to work with to broaden our range' or words to that effect.”

Stakeholder, Wales

- **The local economy will be boosted.** While important, stakeholders feel the social value of any project is equally as important, particularly when the economic impacts of a project are more difficult to evidence. As such, some respond negatively to specific focus on economic benefits.

“The one that people struggle most with is ‘the local economy will be boosted’. There are some, maybe it's just in my sector. But that seems to be the one that's the biggest struggle for oral history projects.”

Stakeholder, UK-wide

“It's fine to have economic value there, but it doesn't have to be about growth always. Economic balance to be maintained. Measuring the whole of the program rather than just measuring it created X amount of jobs.”

Stakeholder, UK-wide

Feedback on the revised objectives

The revised objectives broadly align with stakeholders' views of the priorities for the Heritage Fund and priorities for heritage. While the contents is largely supported, stakeholders identify several areas where further detail and clarity would improve the objectives and make them better match stakeholder perspectives on the current context:

- Some stakeholders do not feel they currently capture the value of heritage for the sake of heritage. While the extended benefits and impact of heritage are deemed important (particularly in terms of contributing to the climate crisis), they feel some heritage should be valued for its existence in its own right. This means that it should be able to exist (and thrive) even if it does not demonstrate benefit and impact. The objectives in the updated strategy should therefore consider how to speak to heritage's innate worth.

“Why does heritage have to be used strategically and purposefully, why does there always have to be an agenda? Why can't we just preserve heritage for the sake of it?”

Stakeholder, Northern Ireland

“It's so important to us but it's always linked to the value of it for people, economy and other things but why is there no importance placed on the maintenance of our heritage because it has innate value?”

Stakeholder, Scotland

- Stakeholders also feel the revised objectives are **too high level and for many, vague and open to interpretation**. Stakeholders feel objectives need to be well-defined with accompanying outcomes in order to:
 - Understand the measures that would be in place to monitor the success of funded projects, and the Heritage Fund overall, against these objectives.
 - Avoid misinterpretation or a lack of understanding, particularly for smaller organisations and individuals working in heritage who do not speak the 'language' of funders, thereby putting them at a disadvantage of receiving funding.
 - Avoid dampening the significance of what the objectives aim to achieve. A smaller minority of stakeholders feel the current language of the objectives does not adequately stress the importance and shift needed to reach them. For example, the objective to 'ensure heritage is for everyone' feels lacks the strength compared to the word 'inclusive', which more explicitly points to the need to make heritage more diverse.

"The language has been depoliticised. For example, it doesn't include the word 'inclusivity'. Instead, it just says 'heritage is for everyone' but inclusive would make organisations feel like they need to take multiple steps towards achieving it."

Stakeholder, England

"If I was writing an application, I'd think 'How am I going to ensure a better future for the UK's heritage'. What's the word? Amorphous? Vague? The ones from earlier made more sense, I think somebody's tried to be punchy, but we've lost some clarity. Thrive? What does thrive mean?"

Stakeholder, UK-wide

- Stakeholders would also like to see great clarity on **how objectives will be prioritised**. Concerns about the hierarchy of objectives relate largely to the objective to 'ensure local economies are strengthened through heritage'. While economic contributions are recognised as an important benefit of heritage, this is seen as secondary to the other additional benefits heritage offers, particularly in relation to wellbeing, learning and enjoyment of heritage.

"I'm uncomfortable with the first one being economies. I don't think it's our job to address market value and economies. We should address the heritage, we're not here about the economies and market value."

Stakeholder, England

"Economy should be a by-product from having heritage as a focus."

Stakeholder, Northern Ireland

“I’m least persuaded by the economic argument. A strong heritage for Wales... If a driver is how does this project deliver on money, particularly in an age for financial hardships, I’m much more persuaded by the others.”

Stakeholder, Wales

- Several **key challenges for heritage are also felt to be missing** from these objectives. Stakeholders feel that the following issues need to be reflected, so that the Fund is reflecting the current context of heritage and future risks it, and the organisations working within it, faces:
 - The climate crisis: The mention of sustainability in the objectives does not adequately cover the focus this is felt to need.
 - Retention and development of skills: As a major challenge for heritage’s workforce, stakeholders expect an objective that explicitly speaks to this.
 - Recognition that heritage can be in poor condition (heritage at risk): A handful of stakeholders across workshops expect to see recognition in the objectives that not all heritage is currently in a good condition, and that work needs to be done to both protect and recover heritage.

“All this becomes a completely meaningless statement unless there is resourcing. Paradigm shift is required in our minds and funding. Do we really appreciate what we’re saying there, what we’re asking all the orgs? How will they properly support that?”

Stakeholder, Scotland

“I don’t think the climate emergency is explicit enough here. Organisations that weren’t fully committed to the climate crises, could weave through this.”

Stakeholder, UK-wide

6.5 The role of the National Lottery Heritage Fund beyond funding

Beyond funding, stakeholders see the Heritage Fund as having an important role to play in facilitating the success of heritage over the coming years. The areas where they would like to see Heritage Fund play a role include:

Networking and collaboration

The Heritage Fund is seen to be an ideally placed facilitator, with the capacity to host events, connect UK-wide heritage organisations and drive large scale collaboration. By providing networking opportunities for those working with or around heritage, the Heritage Fund can facilitate skills-sharing and knowledge transfer across different heritage organisations.

This is firstly seen to have a key role in opening up opportunities for alternative means of accessing funding. Stakeholders feel the Heritage Fund’s prominent position in the funding landscape would enable it to signpost organisations working in and with heritage to alternative funding pots. This would be particularly valuable for organisations when a funding

application to the Heritage Fund is not successful. Stakeholders already identify opportunities for this to happen that have been created through:

- **Matched funding**, and the organisations, charities or government bodies that provide this. Stakeholders feel the Heritage Fund could signpost to where this can be accessed, or work with organisations to pre-match funding so organisations can streamline their applications.
- **The increased importance of social value** which opens up opportunities for funding by taking advantage of the need for private companies to demonstrate social value in their government contracts (through the Social Value Act) and other private interest to support engagement with heritage through corporate social responsibility. Stakeholders feel the Heritage Fund could provide guidance for organisations on avenues for establishing these mutually beneficial partnerships with businesses.

“The social value act and the recognition that public procurement should be generating social value is a huge opportunity... What we really need as a sector is clear guidance on that and to use those opportunities. I know there are a lot of restrictions in our commercial contract about what we can facilitate but when we make contacts, we generate ideas for fantastic projects that we might want to pursue separate sources of funding for.”

Stakeholder, UK-wide

Secondly however, stakeholders see value in the Heritage Fund encouraging collaboration as a way to reach shared goals on key issues such as the climate crisis and talent shortage. Stakeholders often cite frustrations that organisations across heritage are currently failing to properly make use of resources available to better respond to such issues, and feel collaboration across organisations is key in driving impact.

This could include, for example, collaboration in the form of mentorship programmes to facilitate career progression, helping to overcome skills challenges in heritage. However, it could also include collaboration with bodies and organisations outside of heritage, including:

- **Government bodies**, to establish initiatives and inform policy.
- **The health sector**, to make the most of opportunities borne out of social prescribing initiatives.
- **Creative industries**, to better promote heritage.
- **Local authorities**, to ensure heritage is being considered in decision making, particularly in areas where heritage is currently underfunded.
- **Organisations or sectors** who are working on solutions to challenges that will impact heritage (eg: the climate crisis).

“Numerous events were funded by the Lottery but there was no strategic engagement. We don’t need vast amounts of money, just stability. Then we understand it’s a collaboration and we’re more resilient. We’re not all just one type of organisation that fits easily into the funding model.”

Stakeholder, UK-wide

“Collaboration and supporting networks across projects is something that has worked well. Should focus on supporting activation science, community driven projects and local councils.”

Stakeholder, England

Finally, collaboration is felt to be key in terms of working not just with established heritage organisations but local community and grassroots organisations, as well as communities themselves as well. With stakeholders placing emphasis on a hyper-local approach where relevant, working with such individuals can help ensure a real understanding of local needs and requirements.

“I know where needs investment right now and has the capacity to support it and which areas need a resilience grant to build up capacity to prove that a building has worth. I would really like the Heritage Fund to work with the people they are supposed to be supporting instead of making these decisions themselves.”

Stakeholder, England

Sharing expertise and guidelines for working

The National Lottery Heritage Fund is seen as a reliable source of information regarding expertise and best practice pertaining to heritage. Furthermore, stakeholders feel that The National Lottery Heritage Fund should be leading in key topics, by establishing guidelines for working. In particular, stakeholders would benefit from the Heritage Fund sharing expertise and guidelines around:

- **Evaluating the impact of a project**, for example, measurement tools or project-specific learnings.
- **Responding to the climate crisis**, for example guidance from the Heritage Fund on quantifying the risks and losses around climate change-induced damage and support for its mitigation.
- **Ensuring equality diversity and inclusion**, including clear guidelines for recipients of funding and advice on best practice.
- **The funding application process**, including increased assistance with application questions or organisation-specific advice on funding guidelines.

“Sharing of information is key. Peer learning, and the inclusion of experts. The bigger issue of how you prepare with challenges of reducing your carbon impact would be useful, including evaluation and all aspects of running as an organisation.”

Stakeholder, England

“It would help if the funding officers have got an idea of the sector and the challenges of each organisation and general awareness of pressures on heritage organisations specifically.”

Stakeholder, Wales

Advocating for heritage

The National Lottery Heritage Fund is seen to have an important advocacy role considering the evolving policy and funding landscapes. Stakeholders would like to see the Heritage Fund do more to advocate for heritage in both public and private sectors, including both government and private funders.

Stakeholders feel the Heritage Fund have a responsibility to work with governments to inform the direction of public policy on UK heritage. This provides an opportunity for the Heritage Fund to utilise data from funded projects to inform evidence-based public policy and align this with the priorities identified by the Heritage Fund over the coming years.

“The Heritage Fund really needs to advocate at the very senior levels of government. The Heritage Fund because of the projects they have funded, have vast amounts of data on the impact of heritage on wider society and individuals. I’m not sure if any of that gets used to change the political agenda. As the biggest public funder, there’s huge amounts of case studies and data.”

Stakeholder, UK-wide

“I’d like them to raise awareness for the need to fund the heritage sector through other grant-making trusts. They should help with strengthening that network with other grantees across the board.”

Stakeholder, Scotland

As part of this, stakeholders would like to see the Heritage Fund take leadership for increasing the amount of funding available. This would involve advocating for grant-making trusts and private funders to mobilise funding on a similar scale to that provided by the Heritage Fund.

“We need advocacy to the private sector and to major private donors. There is something about advocacy from the Fund to funding partners in the private sector.”

Stakeholder, Scotland

Building stronger relationships with grantees

Generally speaking, stakeholders are satisfied with how The National Lottery Heritage Fund is working with heritage organisations. However, some would like to see the Heritage Fund do more to establish itself as a long-term collaborator, rather than just a grant deliverer with the organisations it funds.

While others question whether this is possible given its fundamental role as a funder rather than an equal partner, there is clear scope for improvements to be made. This could include more follow-up with organisations following funding to evaluate how a project has run, share wider knowledge to help individual projects benefit from previous learnings and assess whether a project would benefit from further funding. More assistance could also be given in terms of how to best implement funding to ensure impact and value.

Outside of grant delivery, stakeholders feel proactive work to understand the needs and challenges organisations and specific types of heritage face would demonstrate the Heritage Fund values the voice, experience and expertise of those working on the ground. Doing so would point to the funder adopting a local lens when reviewing grant applications.

Enhancing the UK heritage's global image

Stakeholders often note feeling unsure as to the extent to which international work is covered within the remit of the Heritage Fund, however there is a desire to see it included. In an ever-globalised world, stakeholders feels heritage organisations based in the UK need to consider how heritage is discussed and perceived by the wider world as well as how it relates to the heritage and histories of other countries.

With more and more collaboration and networking already happening online, opportunities to expand collaborations internationally have emerged, which stakeholders feel could be built on with further funding in order to:

- Enhance the impact and reach of heritage projects.
- Strengthen UK heritage's international reputation.
- Celebrate international milestones and global heritage.

“The National Lottery Heritage Fund need to think about how they connect with the world. We're linked with world heritage – we need to think about how we can celebrate that.”

Stakeholder, England

7. Appendix

7.1 Quantitative sample breakdown

Online survey with 2215 responses

Category	Subcategory	Count	Percentage
Gender	Male	1,080	49%
Gender	Female	1,130	51%
Gender	Other	4	-%
Age	18-24	239	11%
Age	25-34	381	17%
Age	35-44	353	16%
Age	45-54	386	17%
Age	55-64	338	15%
Age	65+	518	23%
Social economic grade	AB	583	26%
Social economic grade	C1C2	1103	50%
Social economic grade	DE	528	24%
Geographical location	Scotland	188	8%
Geographical location	Northern Ireland	62	3%
Geographical location	Wales	104	5%
Geographical location	North East England	91	4%
Geographical location	North West England	246	11%
Geographical location	Yorkshire & Humberside	184	8%
Geographical location	West Midlands	190	9%
Geographical location	East Midlands	159	7%
Geographical location	Eastern England	206	9%

Geographical location	London	292	13%
Geographical location	South East England	301	14%
Geographical location	South West England	190	9%
Ethnicity	White	1908	86%
Ethnicity	Mixed	40	2%
Ethnicity	Asian	122	6%
Ethnicity	Black	66	3%
Ethnicity	Chinese	44	2%
Ethnicity	Other ethnic group	13	1%
Ethnicity	Prefer not to say	22	1%

7.2 Stimulus shown to stakeholders within workshops

Current priorities and principles of the wider current funding framework

Stakeholders were shown the following information on The National Lottery Heritage Fund's current priorities and wider principles as outlined in the current funding framework:

- **Heritage at risk:** *Ensure we conserve, protect and pass on heritage which is at risk of loss, damage or neglect.*
- **Landscapes and nature:** *Ensure projects supported do their utmost to reduce biodiversity loss, maintain the beauty and quality of our urban and rural landscapes, and help people to reconnect with the UK's natural heritage.*
- **Community heritage:** *Champion what people value and want to hand on to the future, such as helping people researching and sharing the history or a community or a place.*
- **Heritage in the four countries of the UK:** *Ensure funding recognises local needs or plans across the UK.*
- **Inclusive heritage:** *Ensure everyone is able to participate in heritage, regardless of their background, personal characteristics or circumstances*

Current outcomes for heritage from the current funding framework

- Heritage will be in better condition
- Heritage will be identified and better explained
- A wider range of people will be involved in heritage (a mandatory objective)
- The funded organisation will be more resilient
- People will have developed skills
- People will have learnt about heritage, leading to change in ideas and actions
- People will have greater wellbeing

- The local area will be a better place to live, work or visit
- The local economy will be boosted

Revised objectives for the updated strategy

- Ensure local economies are strengthened through heritage
- Ensure a better future for the UK's heritage
- Ensure heritage enables people and places to thrive
- Ensure heritage is for everyone
- Ensure heritage is valued, resilient and sustainable
- Ensure heritage is a source of inspiration and enrichment