

An Economic, Social and Cultural Impact Study of the Jurassic Coast

A SUMMARY OF FINDINGS



INTRODUCTION

In December 2001, the Dorset and East Devon coastline was designated by the United Nations Educational Scientific and Cultural Organisation (UNESCO) as England's first natural World Heritage Site. Extending from Exmouth in East Devon to Studland Bay in Dorset, the 'Jurassic Coast', as it is more commonly known, was awarded its status in recognition of its importance to the Earth Sciences; the 95 miles of exposed coastline show a sequence through 185 million years of Earth History and evolution, meaning that a walk along the coast is a walk through the Triassic, Jurassic and Cretaceous periods of geological time.

Since 2001, many activities and initiatives have taken place in Dorset and East Devon that have been influenced or stimulated in some way by the World Heritage Site designation. Some of these have been initiated by the managing Steering Group and Team for the Site, others have been developed by the many partners or partnerships that have evolved since 2001. Many have come about independently of the management of the Site and out of people's desire to make the most of the designation for their businesses and themselves.

In 2008, the Steering Group commissioned an independent consultancy ERA Ltd to try to capture the extent of this activity and assess the resulting economic, social and cultural impacts stimulated by the Site's designation. This document is a summary of their findings, showing some very positive conclusions and raising some clear challenges, all of which are summarised on the following pages.

In summary, the report provides a baseline of evidence which all partners, whether businesses, community groups, visitor centres, schools, arts organisations, individuals or local authorities can use to help steer and guide their future involvement with the WHS, and which they can continue to feed into and develop further. It shows us how we can all build on the positive impacts of the designation, and address the challenges for the future in order to help the World Heritage Site really make a difference to people's lives.

D. M. Gobbett

Don Gobbett
Chair of the Dorset and East Devon World Heritage Site Steering Group

To send us feedback on this report, or for more details about this or any other issue related to the World Heritage Site, please go to www.jurassiccoast.com or contact the Team on 01305 225101 / info@jurassiccoast.com



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THE FINDINGS

The result of the study is a comprehensive social, cultural and economic impact evaluation of the JC WHS, which shows where the Jurassic Coast appears to have exceeded the common expectation that WHS designation does not achieve significant impacts.

The study proposes that UNESCO recognition for the 'outstanding universal value' of the Jurassic Coast has stimulated the creation of a new identity for the coastal region. The findings suggest that the coastal region has become more dynamic as a result of this new identity, which is demonstrated in the following ways:

- **increased investment**
- **better partnership working**
- **increased media recognition at a national and international level**
- **new infrastructure and services**
- **new business start-ups with new products**
- **new employment opportunities**
- **the increasing sustainability of the tourism product**
- **improved education linkages nationally and internationally.**



THE CHALLENGES

However the study also identifies challenges. Most of the potential investment in capital projects is currently in the developmental stages, and the delivery and quality of these projects is critical to how the success of the JC WHS will be judged by communities, visitors and stakeholders. For the designation of the JC WHS to reach its full potential as a social, cultural and regeneration driver, the JC WHS managing partnership needs to continue to develop a strategic approach that covers the whole coast and coordinates in a coherent manner the assets that exist on the coast. This should justify investment with a robust evidence base demonstrating the impacts that can be created not only for the Jurassic Coast communities, but also for the South West and the UK.

The regenerative impact of the JC WHS designation will be gauged by how it affects people's lives in the communities of the coastal region. These communities face opportunities and challenges in a global marketplace.

To drive the regenerative process forward successfully, the study identifies a key need for the management partnership of the JC WHS to continue to:

- **stimulate sustainable economic development**
- **create sustainable employment opportunities**
- **attract new inward investment**
- **add value to existing and future products**

The study suggests that this process is at an early stage for the Jurassic Coast and that there remain considerable opportunities for future potential achievements.

THE APPROACH

To be designated a World Heritage Site is simultaneously:

- A celebration of the international recognition of the outstanding universal value of the site
- A responsibility to past present and future generations to maintain and enhance that value
- An opportunity to deliver sustainable development and progress for people locally, nationally and internationally.

The potential benefits of the designation and associated activities cover a broad geographical area and diverse sectors, with many initiatives delivered by more than 300 stakeholder partners. Primary evidence of impact is limited due to the coast covering several administrative, marketing and data-gathering boundaries – meaning that there is little comparative data that refers explicitly to the Jurassic Coast area. In the absence of this robust primary data, the perceptions of individuals, businesses, communities and stakeholder organisations about levels of impact are crucial.

In view of this, the research looked at three levels of impact: the regional, national and international impact, the impact on the 'gateway' and 'anchor towns', and the impact on the key sectors. The research has then measured these impacts across the three key roles of the JC WHS, namely:

- developing the identity of the Jurassic Coast
- managing and conserving the World Heritage Site
- developing the potential opportunities stimulated by the designation.

The research set out to take a holistic view of what the designation has stimulated, and the impacts created – to develop a robust framework of benchmarks to monitor and evaluate future impacts, which are detailed in the full study.

At the end of the document, there is a description of the background to the study, together with an outline of the research undertaken and surveys referred to in the text.



RESULTS: THE SUMMARY

The main areas of impact are summarised below. Each impact is then explored in further detail on the page indicated, with sample evidence drawn from the full report and accompanying case studies.

1. THE NEW IDENTITY... Page 6

The biggest single impact of the Jurassic Coast WHS status has been the emergence of a clear identity for a stretch of coastline that previously had no unifying sense of identity.

2. A NATIONAL BRAND... Page 6

Prior to the emergence of the 'Jurassic Coast' brand the coastline was marketed under a variety of labels – evidence suggests that the 'Jurassic Coast World Heritage Site' is emerging as a national brand.

3. AN INTERNATIONAL PROFILE... Page 7

The JC WHS Stakeholder Survey 2008 revealed that 94% of respondents see value to some extent in the new JC WHS identity and the international profile and credibility which it brings. There is a strong perception amongst businesses and individuals that the Jurassic Coast is better able to compete in world tourism markets as a result of its new identity.

4. INFLUENCING VISITING PATTERNS... Page 9

A growing body of qualitative and quantitative evidence is emerging which suggests businesses and communities believe WHS status to be having significant impacts on influencing tourism footfall. Anecdotal evidence from face to face interviews suggests that this applies especially in the shoulder months of the tourism season.

5. STIMULATING NEW PRODUCTS AND MARKETS... Page 10

Businesses see the designation as something that can change perceptions of the coast and drive customers to their businesses. These perceptions are of course significant impacts that have been forged by experiences in real markets over the past few years.

6. EFFECTIVE MANAGEMENT AND MARKETING... Page 11

The Dorset Citizen's Survey 2008 shows that 54% of residents believe that Dorset has received greater media attention and increased press coverage as a result of WHS status. The JC WHS Stakeholder Survey 2008 reveals that 76% of respondents from the tourism sector have been influenced in how they marketed their businesses by the new JC WHS identity.

7. PROMOTING SUSTAINABLE TOURISM... Page 12

Since 2001 the Jurassic Coast managing partnership has had the ambition for the JC WHS to become a leading sustainable tourism destination, and successes have been achieved both in real achievements and in changes to perception.

8. CONTRIBUTING TO REGIONAL DEVELOPMENT... Page 13

Anecdotal and survey evidence suggests that the brand is being used in a number of ways, including the creation of new national heritage, cultural and creative initiatives and projects.

9. CREATING NEW PARTNERSHIPS... Page 14

68% of survey respondents believe that the JC WHS has prompted some increased partnership working. More than 100 respondents (37%) felt that their organisation or businesses had been able to capitalize on new partnership working.

10. ATTRACTING INVESTMENT... Page 15

The South West Regional Development Agency (SWRDA) Funding Framework Agreement, which involves potential investment over the 5 years from April 2006 aims to establish a network of new visitor centres and interpretation facilities was a key achievement. The Heritage Lottery Fund is potentially investing £4.3 million into five projects, which explore and explain the Jurassic Coast heritage and identity.

11. INCREASING UNDERSTANDING... Page 16

The JC WHS Stakeholder Survey 2008 reveals that 80% of respondents based within the education sector believe that this education market has grown in recent years – 84% believe this is due to some extent to the JC WHS identity.

12. ENGAGING COMMUNITIES... Page 17

Encouragingly, there is early evidence that the site may be a stimulus to the development of better services for local people. However, anecdotal and survey evidence suggests that more work is needed to create a sense of ownership in local communities of the site and its management.

1. THE NEW IDENTITY

The biggest single impact of the Jurassic Coast WHS status has been the emergence of a clear identity for a stretch of coastline that previously had no unifying sense of identity. In particular the adoption, celebration and ownership of the identity which the designation has offered has resulted in new, improved and sustainable partnership working towards one vision through a strong steering group and extensive network of partners involving over 300 organisations.

- 61% of respondents to the Jurassic Coast World Heritage Site Survey 2008 (JC WHS Stakeholder Survey 2008) stated that their 'business or organisation values the UNESCO Jurassic Coast World Heritage Site status' 'Highly' – another 31% valued it 'To some extent' – only 8% did not value it at all. This is a very significant level of value – and is much higher than expected from previous analysis of other WHS.
- 37% of respondents in the JC WHS Stakeholder Survey 2008 felt their organisations had been able to capitalize on new partnership working as a result of WHS status – more than 100 businesses and organisations. But there is room for improvement, as 63% of respondents had not been able to capitalise on new partnership working.
- In the JC WHS Stakeholder Survey 2008, of 301 respondents, 82% stated that the new Jurassic Coast identity has had a positive impact on confidence in the area and the local economy. Only 2% felt there had been a negative impact, and 16% felt it had had no impact at all.
- In the JC WHS Stakeholder Survey 2008, of 299 respondents 57.5% stated that the new identity has had a 'positive impact' on the way development takes place in their 'town/community'. Only 5% stated there had been a negative impact and 37.5% stated 'no impact at all'.

2. A NATIONAL BRAND

Prior to the emergence of the 'Jurassic Coast' brand the coastline was marketed under a variety of labels – evidence suggests that the 'Jurassic Coast World Heritage Site' is emerging as a national brand. A growing body of qualitative and quantitative evidence shows how individuals, communities, businesses and organisations are aware of the new brand, how they are using it, and why they value it...

- In the Dorset Citizen's Panel Survey 2008, 89% of respondents had heard of the 'Jurassic Coast' and were aware that 'it was a World Heritage Site' – another 9% had heard of the Jurassic Coast but were not aware that it was a WHS. Less than 2% of citizens in the surveys were unaware of the new Jurassic Coast identity. In the respective survey for Poole in 2008 78% of residents had heard of the 'Jurassic Coast' and knew it was a WHS. In the Devon Voice Survey 2008, 97% of people had heard of the Jurassic Coast and 95% of people were aware of its World Heritage Status. These surveys had in total more than 2,500 respondents providing a robust sample of the public awareness levels.
- The JC WHS Stakeholder Survey 2008 reveals that the most valued aspects of the JC WHS for educational respondents are that it 'assists in the delivery of the national curriculum', makes 'a positive impact on the lives of children and young people', 'creates a stronger sense of pride and identity', offers linkages between local educational organisations, and 'offers new training and skills areas'.

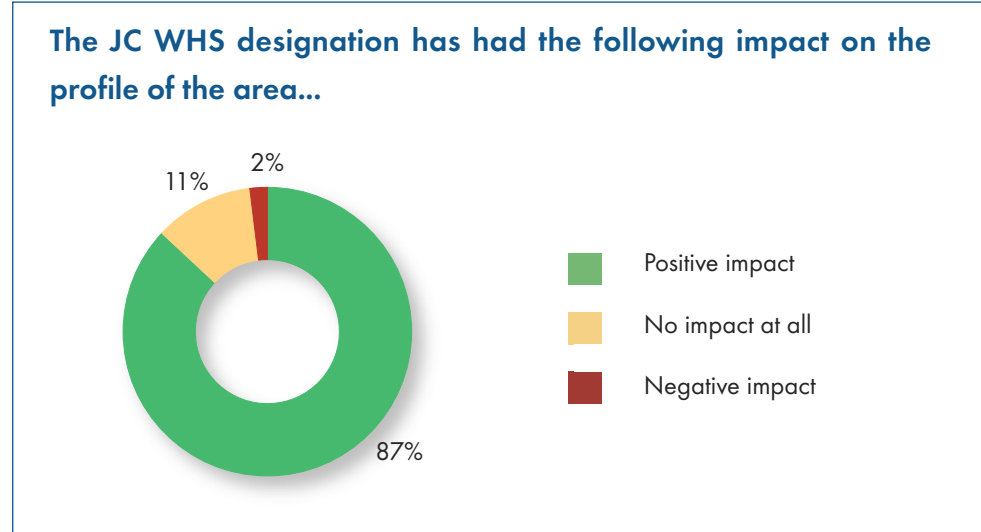


3. AN INTERNATIONAL PROFILE

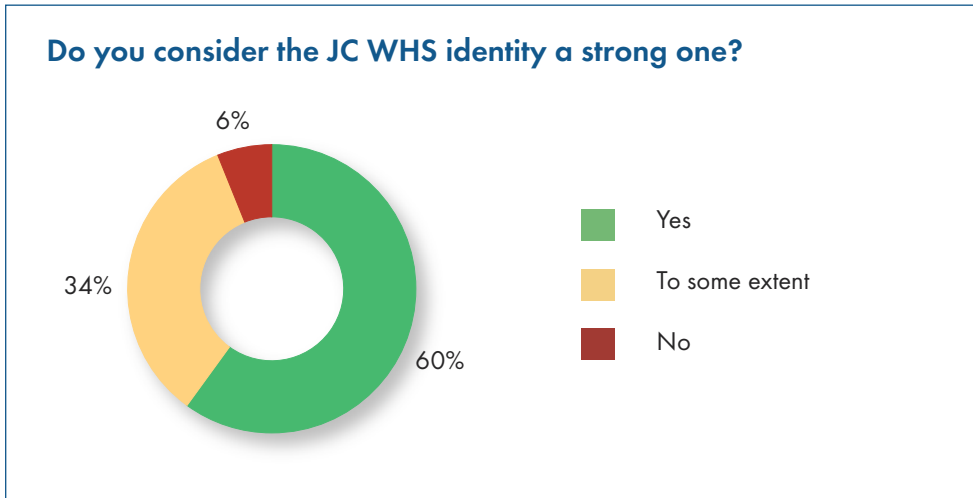
Internationally, minimal research has been undertaken on the impact of WHS status as creating a new identity, and there is a common expectation that WHS designation does not achieve significant impacts. In contrast to this perception, the research and consultation carried out on the Jurassic Coast reveals some strong impacts.

- When asked to identify which one of the popularly used brands associated with the coast was most highly valued, respondents to the JC WHS Stakeholder Survey 2008 were clear that the highest value lay in the association between the 'Jurassic Coast' label with its widely-understood connotations with dinosaurs and geology, and the 'World Heritage Site' label which gives the coast its international credibility and importance – in short, the most popular brand was 'Jurassic Coast – World Heritage Site'.
- The JC WHS Stakeholder Survey 2008 revealed that 94% of respondents see value of some extent in the new JC WHS identity.

There appear to be differing views of what constitutes the 'brand'. The public sector stakeholders understand the brand to be the official logo and title, and the private sector stakeholders often believe that the label 'Jurassic Coast' itself was the brand. Greater clarity is required about the 'brand', who can use it, and how businesses engage with it. However, it is encouraging that the brand is viewed as a quality benchmark by some stakeholders, with potential as a regeneration driver.



- The JC WHS Stakeholder Survey 2008 revealed that 87% of respondents believe the WHS designation has had a 'positive impact' on the 'profile of the area'.
- The JC WHS Stakeholder Survey 2008 survey reveals that the impact on a new sense of identity is felt to be less in respondent's own communities, suggesting that the identity is perceived to work better for the whole coast than for people's own communities. 57.5% felt that the new identity has had a 'positive impact' on the way that development takes place in their own community, 37.5% felt it had made no impact at all, and only 5% felt it had created a negative impact on development in their community.



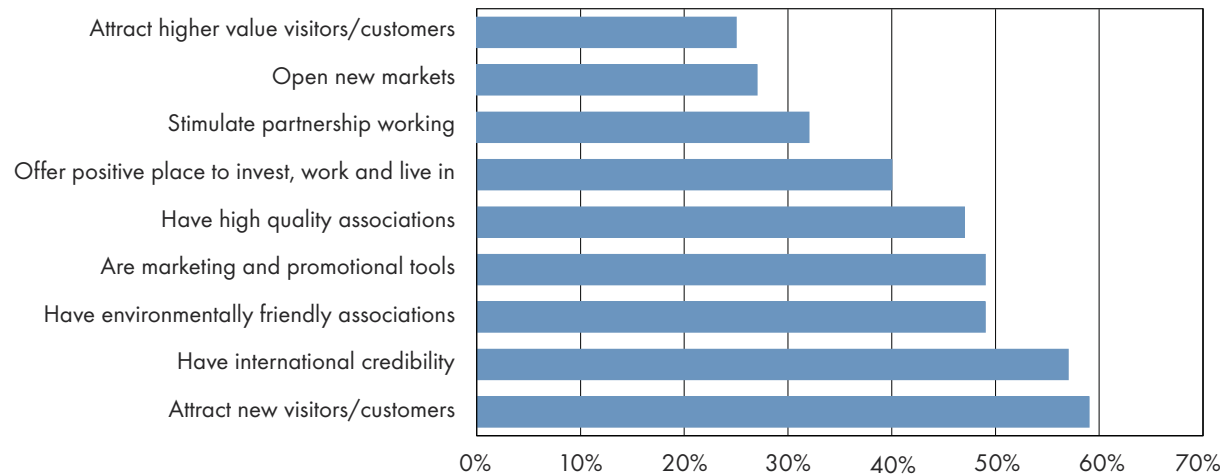
The research and consultation also reveals why individuals, communities, businesses and organisations value the new identity/brand.

- The Jurassic Coast WHS Survey 2008 asked respondents to make a value judgment about why their business or organisation valued the WHS brands. The hierarchy of value which emerged is illustrated in the graph below.

It is clear that businesses see the designation as something that can change perceptions of the coast and drive customers to their businesses. These perceptions are of course significant impacts that have been forged by experiences in real markets over the past few years.



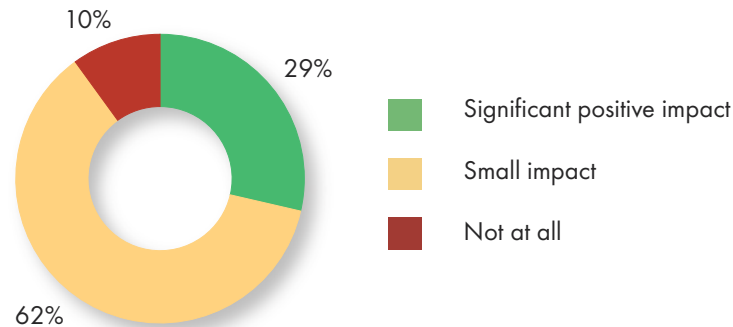
Why stakeholders value the JC WHS identity...



4. INFLUENCING VISITING PATTERNS

There is no comprehensive tourism data for the Jurassic Coast that would enable a clear attribution as to what percentage of the approximate 5 million visits to the Jurassic Coast were a direct result of the new identity - the consequence of tourism data being collected by a range of agencies, who cover parts but not all of the Jurassic Coast and its hinterlands. However, a growing body of qualitative and quantitative evidence is emerging which suggests businesses and communities believe WHS status to be having significant impacts on influencing tourism footfall. Anecdotal evidence from face to face interviews suggests that this applies especially in the shoulder months of the tourism season.

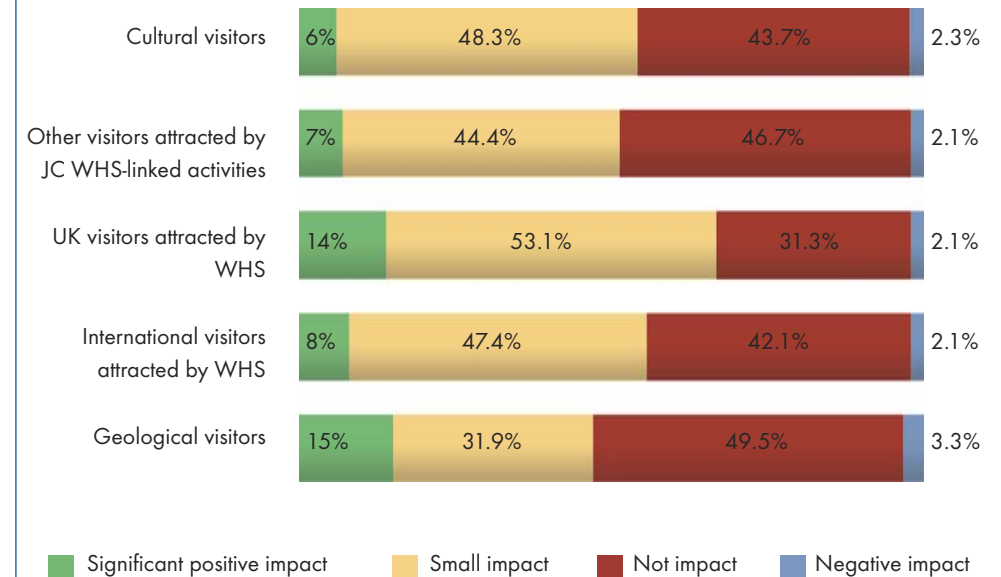
How far is the JC WHS identity contributing to people's decisions to visit the area?



- It is significant that in the JC WHS Stakeholder Survey 2008 a combined 91% of tourism respondents stated that the new identity is 'contributing' to some extent to influencing tourism footfall to the Jurassic Coast. Macro tourism statistics suggest that visitor numbers for the Jurassic Coast are falling, but falling perhaps less steeply than other areas of the South West – suggesting a possible impact of the JC WHS.

- In the JC WHS Stakeholder Survey 2008 75% of respondents felt that tourist numbers had increased since the WHS designation. Amongst tourism respondents, who have a choice of more than one option, 89% identified the growth as being in 'short stay domestic visitors', 39% in short stay international visitors, 15% short stay domestic visitors, and just 5% identifying long stay international visitors as the growth area.
- The JC WHS Stakeholder Survey 2008 suggests that significant percentage of tourism respondents believe the JC WHS identity has benefited their businesses through a change in the profile of visitors as shown in the table below.

Has your business benefited from increased numbers of 'niche' visitors attracted by JC WHS and associated activities?



5. STIMULATING NEW PRODUCTS AND MARKETS

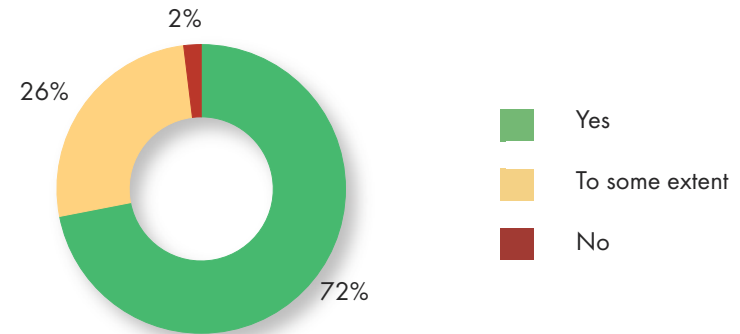
Anecdotal evidence from face-to-face interviews has revealed how this changing tourism product and visitor profile has enabled entrepreneurs to develop new products and markets.

CASE STUDY 1

Businesses like Stuart Line Cruises in Exmouth have invested heavily and created employment as a 'direct result' the JC WHS identity. Businessman Ian Stuart is totally convinced of the economic power of WHS status and has an impressively full order book of business to back up his beliefs. Stuart Line Cruises carries approximately 250,000 people a year, approximately 40-50,000 of whom are now on 'Jurassic Coast Cruises'. Passenger numbers for this service have risen year on year for several years. The business is about the translation of the Jurassic Coast geology, through boat cruises and commentary for visitors. This makes the complex geology and sometimes difficult to access coastline easily accessible and clearly explained. Stuart Line Cruises invested more than £300,000 in a boat for 'Jurassic Coast Cruises', as a direct result of WHS status and the new market it has created for interpretation. Ian is categorical on this point; his business model emerged entirely because of the WHS inscription. The company is currently unable to keep up with passenger demand and plans to invest a further £600,000 in a new boat to meet the WHS-driven demand or extend an existing boat. The business employs 8 FTE equivalent employees and 40 PT employees on a seasonal basis.

- In the JC WHS Stakeholder Survey 2008 a significant minority of respondents from the Heritage and Museums sector (34%) stated that the JC WHS brand was having a 'significant positive impact' in 'contributing to people's decision to visit the area', another 59% felt that it had a 'small impact' – In others words, 93% of respondents in this key sector feel that the new identity is influencing tourism footfall to some extent to the Jurassic Coast.
- In the JC WHS Stakeholder Survey 2008, 71% of tourism respondents stated they believe the JC WHS brand 'works well for the tourism industry' – only 2% feel it does not work well for the tourism industry.

Does the JC WHS brand work well for the tourism industry?



- Interviews with stakeholders suggest that private tourism businesses believe that the new JC WHS identity is critical to bringing footfall to their businesses – with customer feedback suggesting the new identity was a considerable factor in their decision to visit the gateway and anchor towns.

Our research and analysis suggests that there is a strong perception amongst businesses and individuals that the Jurassic Coast is better able to compete in world tourism markets as a result of its new identity.

- In the JC WHS Stakeholder Survey 2008 68% of tourism respondents stated they believe the Jurassic Coast is better 'able to compete in world tourism markets' as a result of the JC WHS identity, another 24% felt it assisted 'to some extent', and only 10% felt it did not. That 92% of tourism respondents feel that the new JC WHS identity makes the area better able in global markets is a considerable achievement.

It is not clear how much these impacts are due to a coherent marketing campaign, and how much a result of an existing tourism destination finding a new identity through an organic process of which WHS status was one part. There is a need for further analysis of the respective value of the South West brands, and following that for the tourism marketing to focus on those that have the most power to drive sustainable tourism, particularly in the shoulder months. Anecdotal evidence from private sector businesses suggests that 'Jurassic Coast' has national and international brand value and should be taken seriously in this South West context.

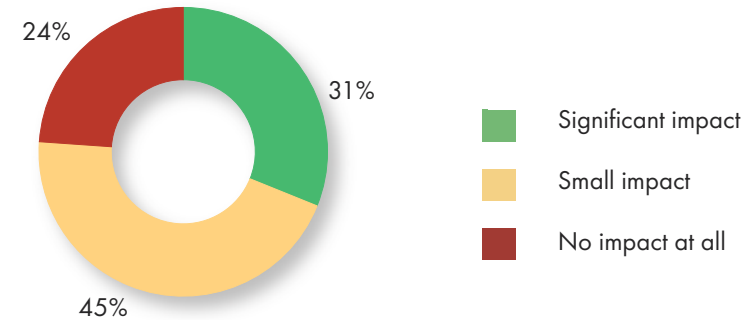
6. EFFECTIVE MANAGEMENT AND MARKETING

It is important to recognise that the impact has flowed not just from the new brand identity, and its associations, but also directly from activities associated or stimulated by the designation and establishment of the partnership and management team.

- Interviews with a significant number of private sector businesses suggest that a key role of the JC WHS management team has been the support and 'translation' of the 'Outstanding Universal Value' of the site into tourism, education, cultural and environmental products and civic ownership messages that the private sector has then been able to market.
- At least 500,000 Jurassic Coast leaflets (Mini Guides) have been produced in English, Dutch, German, Spanish and French, and have been distributed to more than 2000 outlets locally, regionally, nationally and internationally since 2001. The website is gaining in excess of 30,000 unique visitors per month. The JC WHS Stakeholder 2008 Survey shows that the marketing and orientation materials, leaflets and publications produced by the JC WHS Management Team are highly valued. These appear to have real worth for the tourism sector.
- The Dorset Citizen's Survey 2008 shows that 54% of residents believe that Dorset has received greater media attention and increased press coverage as a result of WHS status. Anecdotal evidence suggests that this is starting to convert into a greater sense of civic pride – but more work is needed to engage community members.
- The UNESCO designation of the Jurassic Coast has, perhaps fortuitously, coincided with a growing popular interest in the earth sciences, resulting from TV programmes like Coast, Walking with Dinosaurs, Planet Earth and indeed the 1990s Jurassic Park movies. With the support of the JC WHS managing partnership this has been converted to a considerable and ongoing media interest in the area – with an average of 420 articles per annum, with 20% in the national media. Anecdotal evidence from face to face interviews suggests that this drives tourism footfall, especially in shoulder months of the tourism season.



Has the JC WHS brand influenced how you market your business?



- The JC WHS Stakeholder Survey 2008 reveals that 76% of respondents from the tourism sector have been influenced in how they marketed their businesses by the new JC WHS identity.
 - The JC WHS Stakeholder Survey 2008 reveals that 77% of respondents from the Heritage and Museums sector have been influenced in how they marketed their businesses by the new JC WHS identity.
 - Site visits and interviews with private sector businesses provide strong evidence that tourism businesses are making strong use of the new identity in their own marketing – e.g. The Heights Hotel in Portland redesigning its own brochure to reflect the new identity, and creating packages for customers based on accessing the Jurassic Coast, which are marketed at tourism trade fairs nationally.
- The JC WHS has been a factor in raising aspirations for the tourism product, and facilitating training and business support to raise standards. Whilst it is hard to attribute this solely to WHS, most key stakeholders credit the JC WHS with being a stimulus.**
- The JC WHS Stakeholder Survey 2008 shows that 60% of respondents stating that the JC WHS has been to some extent a 'stimulus for positive change' in their organisation.
 - More than 300 businesses have received training, through the nationally accredited training scheme, Welcome Jurassic Host. Only 34% of the tourism respondents to the JC WHS Stakeholder Survey 2008 had benefited from this training – 60% of these rated the quality of the training as 'good', and 38% considered it 'satisfactory' quality.

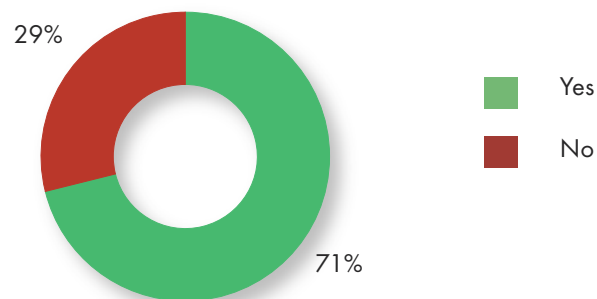
7. PROMOTING SUSTAINABLE TOURISM

Since 2001 the Jurassic Coast managing partnership has had the ambition for the JC WHS to become a leading sustainable tourism destination, and successes have been achieved both in real achievements and in changes to perception.

- The Jurassic Coast won the 2005 Destination Category of global 'Tourism for Tomorrow' awards, and was a finalist in 2004 World Legacy Awards. The Jurassic Coast also inspired the award-winning Jurassic Coast Garden at 2006 Chelsea Flower Show.
- In the JC WHS Stakeholder Survey 2008, 72% of respondents in the tourism sector felt that WHS status had 'been a stimulus to a more sustainable approach to tourism'. What this means in terms of real changes to the tourism infrastructure and product is not yet clear, but clearly WHS is seen by the industry as having had an impact here.

A key challenge for any tourism destination which aims to be 'sustainable' is how to address the environmental impact of people travelling to and around the destination, whether by generating unnecessary CO2 emissions, or affecting local communities through traffic congestion. The JC WHS has some promising early successes in this area.

Do you think the JC WHS status has been a stimulus to a more sustainable approach to tourism?



CASE STUDY 2

As a direct result of JC WHS inscription Dorset and Devon County Councils jointly funded a bus service covering the whole length of the Jurassic Coast WHS. The X53 bus has been described by Hilary Brandt, Guidebook Editor, in the Guardian as 'Britain's Greatest Local Bus Ride'. The service receives a continuously high level of PR attention making it a flagship service for the service operator, First Group, and showcasing their commitment and ability to deliver a high quality service. For Gordon Frost, of First Group, the 'key to the services success' has been 'the creation of a widely recognised and identifiable brand' linking places that were previously deemed to be unconnected. The whole product exists as a result of the move towards WHS inscription, unifying in one tourism product for the coast.

It is believed that public subsidy would need to be twice its current level for the service without WHS inscription and the associated brand value. First Group run extra services on the route in summer on a purely commercial basis between May and October and it is effectively saturated in peak summer. Gordon Frost believes the service and the route have been 'far more successful than originally intended (or envisaged)'. Passenger numbers rose from 2004 onwards with a 36% rise in passengers in 2005-6 on the year before, a 46% rise in 2006-7 and a 4% rise in 2007-8 with over 400,000 ticket sales and 150,000 timetables printed each year. It is envisaged that at current growth rates of passengers, it is possible that the service may not require any public subsidy after the current contract, creating an unsubsidized public bus service. The first contract included £750,000 investment in new buses which was capital grant supported, and the new contract requires £800,000-£900,000 of new vehicles (6 new buses). According to First Group this spend is 'directly related to the JC WHS product'.



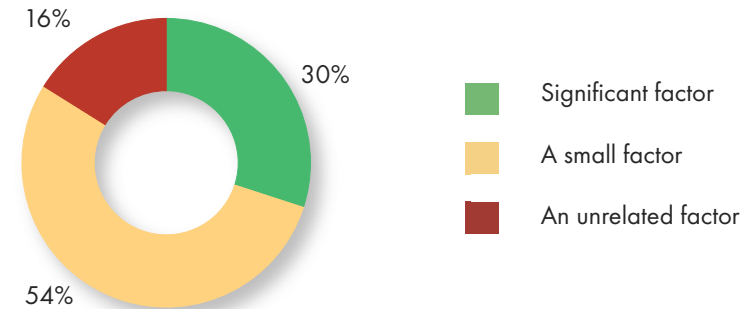
8. CONTRIBUTING TO REGIONAL DEVELOPMENT

A key challenge for the Jurassic Coast has been how to encourage the use of the brand for commercial outcomes, to drive social, cultural and economic development of the region as it strives to compete in world markets. Encouragingly, anecdotal and survey evidence suggests that the brand is being used in a number of ways, including the creation of new national heritage, cultural and creative initiatives and projects.

- The primary reasons for valuing the brands given by respondents to the JC WHS Stakeholder Survey 2008 were commercial reasons, with most value attributed to its power to generate tourism footfall.
- Almost 40% of businesses coming into Dorset and East Devon are from London and the South East, with over 50% from the cultural and creative sectors. Quality of life is a strong motivational factor in such inward investment – an area where stakeholders feel that the new JC WHS is having an effect – for example, companies like J P Morgan describe their operations in Bournemouth to prospective employees in ways which highlight the WHS.
- In the JC WHS Stakeholder Survey 2008 84% of respondents from the Creative and Cultural sector felt that the JC WHS identity had a related impact to the influx of new businesses in the Jurassic Coast sub-region, particularly businesses in the visual arts/design field.
- The JC WHS Stakeholder Survey 2008 reveals that 72% of businesses in the Creative and Cultural Sector feel that the new identity 'to some extent' adds value to their business/products.
- Interviews with key regeneration stakeholders reveal that significant value is attached to the JC WHS brand, as a quality benchmark which can raise aspirations about product quality – with communities like Exmouth using it as a key regeneration tool with local businesses.
- Interviews with key regeneration stakeholders reveal that the new JC WHS identity is contributing significantly to stimulating developments in towns including Weymouth, Lyme Regis, Exmouth and Dorchester.

The research and consultation has also revealed that the impact is being felt across a much wider range of activities than might be expected from such a designation.

The importance of JC WHS designation in attracting visual arts/design businesses to the area...



- Even in sectors that might be expected to have felt little impact from the JC WHS identity, there is evidence suggesting impacts – the JC WHS Stakeholder Survey 2008 revealed that 96% of the retail respondents felt that the new identity has had a positive impact on the image of the coast and its communities, 59% had been impacted in how they marketed their businesses as a result of the new identity, and 66% stated a belief that products from the Jurassic Coast were better able to compete in world markets as a result of the new JC WHS identity.
- The JC WHS Stakeholder Survey 2008 even shows that 75% of respondents from the land-based industries believe that the new identity has had a positive impact on their sector, with 81% stating that the brand offers something of worth for their businesses.
- The JC WHS Stakeholder Survey 2008 also reveals that more than 40 businesses (13% of the sample) and organisations believe that they have created employment as a 'direct result' of the new JC WHS identity. Respondents suggest that more than 50 part time and more than 20 full time equivalent positions have been created as a 'direct result' of the new JC WHS identity. This does not include jobs sustained as a result of the new identity.

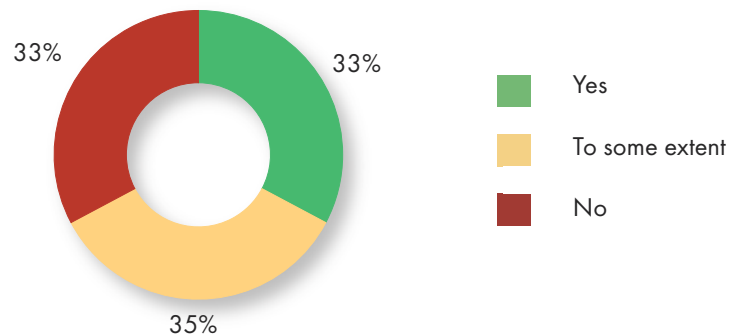
9. CREATING NEW PARTNERSHIPS

The geographical and administrative challenges of protecting, enhancing and celebrating such a unique site as the Jurassic Coast are considerable, and hence creating effective working partnerships is critical.

- A direct result of JC WHS status has been the establishment of working groups with key stakeholders working together on the following themes; Science and Conservation, Museums, Education, Creativity, Tourism, Transport, and Gateway Towns – each with its own strategy. It is estimated that more than 300 organisations are part of the Jurassic Coast WHS partnership in one form or another.
- The JC WHS Stakeholder Survey 2008 reveals that a total of 68% of respondents believe that the JC WHS has prompted some increased partnership working. More than 100 respondents (37%) felt that their organisation or businesses had been able to capitalize on new partnership working. This leaves considerable room for improvement with 63% not fully benefiting from partnership working.

- Interviews with key stakeholders suggest that key capital projects are benefiting from better partnership working. For example, the creation of the JC WHS Arts Strategy and the emerging Arts Council-funded Jurassic Coast cultural project with partners. Key partnerships have emerged or been strengthened as a result of the UNESCO designation, such as the relationship between the Jurassic Coast and the Natural History Museum which has resulted in the Lyme Regis Fossil Festival with its 7,000 annual visitors.

Have you experienced greater partnership working as a result of JC WHS designation...

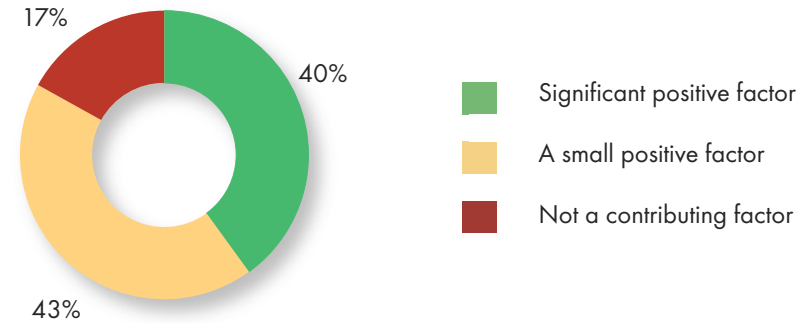


10. ATTRACTING INVESTMENT

A crucial challenge for the Jurassic Coast, and an area in which it clearly needs to have an impact if it is to compete in highly competitive global markets, is the stimulation of increased investment in the area, and particularly in its tourism product and facilities.

- A key achievement is clearly the SWRDA funded Framework Agreement, which involves potential investment over the 5 years from April 2006. The investment aims to establish a network of new visitor centres and interpretation facilities, promoting business excellence, developing knowledge and skills through engaging businesses and communities in the aims of the project, and innovating with digital media projects to provide interpretation, promotion, marketing and linking of the coast through new technologies. WHS status was critical to this potential investment being secured.
- The Heritage Lottery Fund is potentially investing £4.3 million into five projects, which explore and explain the Jurassic Coast heritage and identity.
- Whilst some of the planned capital projects may have emerged in different forms without the JC WHS identity, most stakeholders acknowledge that the key visitor centre capital build projects on the coast are better coordinated, more strategically focused, and consequently attracting more funding, as a result of the coordination of the JC WHS Management team.
- The JC WHS Stakeholder Survey 2008 reveals that those heritage and museum organisations who have received additional investment in the past 5 years believe that the new identity played a significant role in their success. 40% believing it to have been a 'significant positive factor', 43% believing it to have been a 'small positive factor', and just 17% believing it to have not contributed as a factor.
- The JC WHS Stakeholder Survey 2008 reveals that 47 organisations and businesses (16% of the sample) believe they have been able to raise new investment or new sources of revenue as a result of the JC WHS. 14 of these successful organisations were in the Cultural and Creative sector and 61% of these believed that JC WHS was a factor in attracting this new investment.
- Evidence from key funders from interviews reveals that the strategic role played by the JC WHS managing partnership is critical to investor and funder confidence. Funders want to see capital projects developed with a clear strategic fit, and with assurances that projects have the right level of quality, and add value to the existing facilities to create a coherent product.

The importance of JC WHS designation in attracting additional investment to heritage and museum organisations...



11. INCREASING UNDERSTANDING

A key part of the UNESCO designation is to strengthen understanding in the Outstanding Universal Value of the Site through formal education and learning, and increased intellectual access for as wide a range of people as possible, in order to inspire appreciation of our environment.

CASE STUDY 3

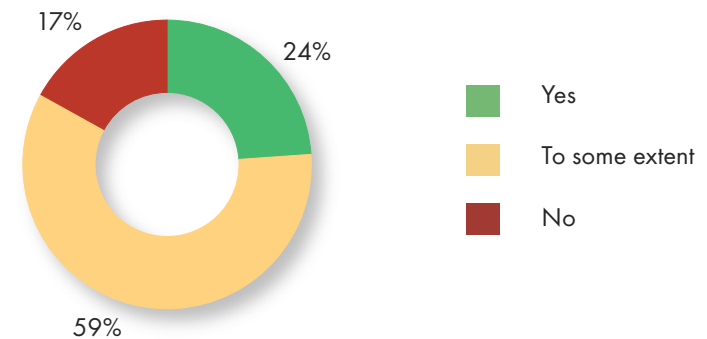
In 2004, the launch of the UNESCO Associated Schools network by the UK National Commission for UNESCO provided a catalyst for several schools along the Jurassic Coast to apply for membership and subsequently rewrite curriculum plans that incorporated the Jurassic Coast and World Heritage. Eight schools have now signed up to the network.



For example, St. Mary's Primary School in Bridport used their UNESCO Associated school status to explore their relationship to the Jurassic Coast and also to other World Heritage Sites across the world. This effort to broaden the horizons of children at the school has been recognised by OFSTED who highlighted the contribution the UNESCO Associated Schools network has made. According to the report "the pupils' awareness of other cultures and societies is greatly enhanced by the school's UNESCO designation". Kate Batorski, a teacher at the school comments "since becoming part of UNESCO Associated Schools we all have been more conscious of making use of every opportunity to help children be more aware of other societies and cultures. For instance, our local development education centre did a very successful workshop with children and parents in Key Stage 1. The children loved the opportunity to find out about another culture. They particularly enjoyed trying out the music and imitating different styles of art – their joint mural now hangs in our music studio and is much admired". Seaton Primary School has also been inspired by their membership of the UNESCO Associated School Network. Children at the school explored aspects of their local heritage in the town and linked this in to a journey to understand the World Heritage Site on their doorstep. Working with an artist, the children designed beautiful silk banners which were based on sketches they had drawn of local landmarks and stories they heard from elders. The silk banners now hang in the town centre and demonstrate the profound impact that living on a World Heritage Site has for children and young people of the town.

- Existing analysis suggests that approximately 200,000 educational bed nights per annum take place to the Jurassic Coast – making it a nationally important destination for learning trips. Anecdotal evidence suggests that the JC WHS identity is adding weight to this regional and national reputation. More than 300 teachers use the Jurassic Coast within their curriculum development programmes.
- The JC WHS Stakeholder Survey 2008 reveals that 80% of respondents based within the education sector believe that this education market has grown in recent years – 84% believe this is due to some extent to the JC WHS identity.
- The JC WHS Stakeholder Survey 2008 reveals that the Heritage and Museums respondents believe that understanding of the site by visitors is a mixed picture.

Do people 'understand' the JC WHS designation and its global importance...



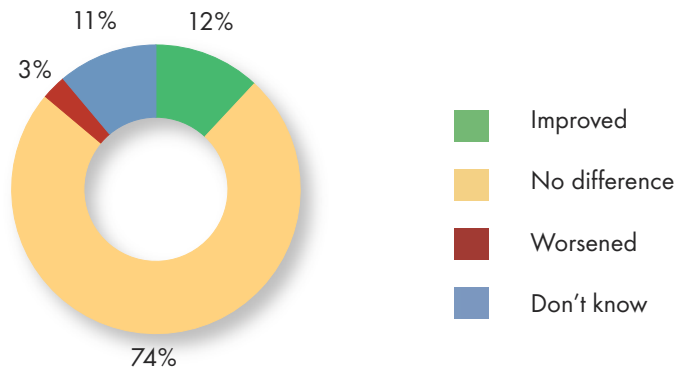
- The Dorset's Citizens Panel 2008 reveals that 51% of residents think the site is explained 'quite well with some interesting information', another 7% believe it is explained 'very well with a lot of interesting information'. However a sizeable minorities would like better interpretation. In the Devon Voice Survey 2008, 46% of respondents think the site is explained "very clearly" or "clearly" and 48% think it is explained in an "OK" manner.

12. ENGAGING COMMUNITIES

In terms of social and cultural value of the JC WHS, it is important to ask sensitive questions about its impact on the communities of the coast and its hinterlands – what is the impact on their quality of life?

- The Dorset Citizens Panel Survey 2008 suggests that for most members of the communities of the Jurassic Coast and its hinterlands, the designation has made 'no difference' (74%) to their quality of life. This poses a real challenge for the core stakeholders to ensure that everybody can benefit in some way from the inscription.

Has the JC WHS designation improved your quality of life?



- Anecdotal and survey evidence suggests that more work is needed to create a sense of ownership in local communities of the site and its management. The Dorset Citizens Panel Survey 2008 reveals that only 19% of respondents feel 'very well' or 'fairly well' informed about the management of the site, with 81% expressing either a mixed or poor understanding of what was happening. The Devon Voice Survey 2008, showed that 23% of people felt "Very well informed" or "Fairly well informed" about the management of the World Heritage Site, whereas 77% felt that they did not know anything, were not well informed, or had a mixed understanding.

- Anecdotal evidence suggests that some communities struggle to cope with the visitors who descend upon their villages, roads, services and public spaces in the peak season. Careful thought, forward planning and some investment may be required to ensure that the site is not spoiled by the visitors it attracts, but also, critically, that the site does not become a negative factor in the lives of people who live and work along its length.
- Encouragingly, there is early evidence that the site may be a stimulus to the development of better services for local people. Investments primarily aimed at visitor management, like the X53 Jurassic Coast bus, become increasingly financially self-sustaining, and leave a legacy of an ongoing service that would not have existed for local people prior to the WHS designation.



Background to the study

Responsibility for safeguarding the World Heritage Site lies with the UK Government, who has charged a locally based partnership to have day to day responsibility for its management and delivery of the Site's Management Plan. This partnership is governed by a non-executive World Heritage Steering Group involving representatives from partner agencies across Dorset and East Devon, the South West, and the UK.

The Jurassic Coast World Heritage Team is a small team established in 2002 to support the Steering Group to deliver the Site Management Plan. The Team is hosted by Dorset County Council, and jointly supported by Dorset and Devon County Councils, Natural England, SWRDA and the Arts Council.

Since UNESCO designated the 'Jurassic Coast' as a natural World Heritage Site in 2001, there has been a clear ambition to use the designation to drive the economic, social and cultural regeneration of the Coast and its hinterlands. This ambition contained both serious challenges, and some promising opportunities. In early 2008 the Jurassic Coast World Heritage Site managing partnership commissioned an evaluation to show whether the designation of the Jurassic Coast as a UNESCO World Heritage Site (WHS) in 2001 has had an impact, and what that impact has been. The research had two tasks:

1. Production of a study measuring the economic, social and cultural impact of the wide range of activities stimulated by the catalyst of World Heritage Site designation, from inscription in 2001 to date.
2. Creation of a Monitoring and Evaluation Framework for the South West Regional Development Agency (SWRDA) funded Jurassic Coast Framework Programme (JCFP) – capital programme of initiatives to support the development of the coast.

Research evidence

The research involved desk-based research of existing impact data, but also required the gathering of new evidence. This resulted in the following:

- 12 questions included in a dedicated JC WHS section within the Dorset Citizens Survey - February 2008 (a biannual sample survey with approx 1,700 local residents responding undertaken by Dorset County Council), and the Devon Voice - July 2008 (a similar County wide survey with approx 600 Devon residents responding undertaken by Devon County Council). Residents of Poole were also independently surveyed by Poole Borough Council in May 2008, with the inclusion of a single question on their awareness of the JC WHS.
- The JC WHS Stakeholder Survey 2008- An bespoke online survey undertaken by Era Ltd, which was distributed widely through the Jurassic Coast contact network, and via other partner networks such the four district authorities, Dorset Business and Devon Chambers, Dorset and Devon schools, museums and libraries, as well as cultural and geological organisations. This resulted in responses from more than 460 stakeholders in the sub-region. Data quoted in the summary refers to various numbers of respondents according to the question asked.
- In addition, there were In excess of 50 key stakeholder interviews, a series of site visits to key development sites and stakeholders, and a series of presentations and seminars.

Abbreviations:

JC WHS – Jurassic Coast World Heritage Site

UNESCO – United Nations Educational, Scientific and Cultural Organization

SWRDA – South West Regional Development Agency

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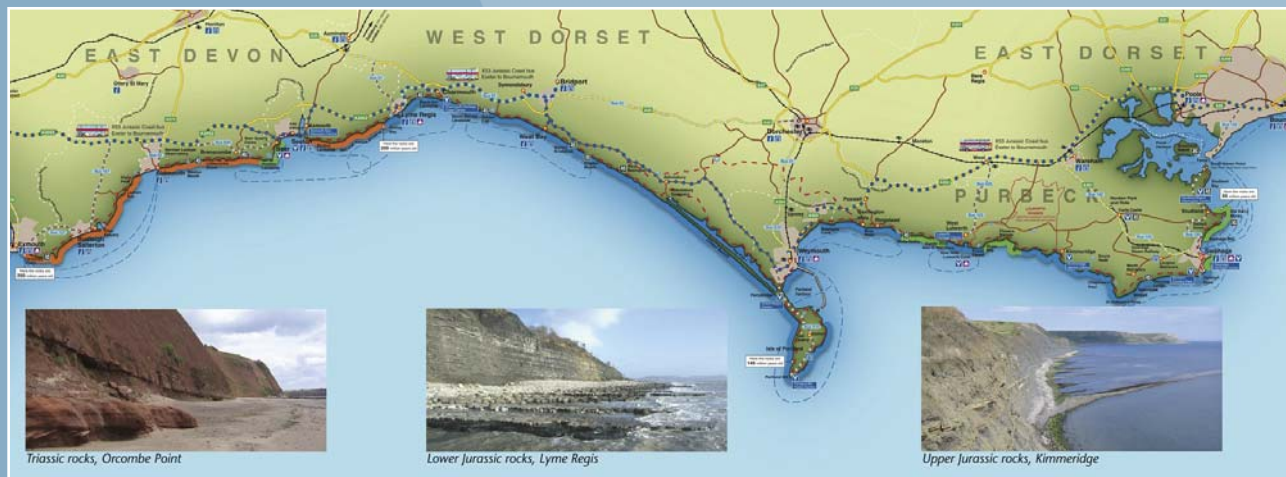
ABOUT THE JURASSIC COAST

The Dorset and East Devon Coast World Heritage Site is England's first natural World Heritage Site - it is known as The Jurassic Coast. It covers 95 miles of truly stunning coastline from East Devon to Dorset, with rocks recording 185 million years of the Earth's history.

World Heritage status was achieved because of the site's unique insight into the Earth Sciences as it clearly depicts a geological 'walk through time' spanning the Triassic, Jurassic and Cretaceous periods.

"Our vision is that World Heritage Status will inspire people to celebrate, enjoy, value and learn about the Dorset and East Devon Coast, and to safeguard it for future generations in the best possible condition. We wish to ensure World Heritage Status becomes a vibrant strand of life of Dorset and East Devon, and the wider South West, benefiting local people, visitors and the environment throughout the area."

The Jurassic Coast World Heritage Site Management Plan



www.jurassiccoast.com

