

Leicester
City Council

**MEETING OF THE HERITAGE, CULTURE, LEISURE AND SPORT
SCRUTINY COMMISSION**

DATE: THURSDAY, 24 SEPTEMBER 2015
TIME: 5.30pm
**PLACE: Meeting Room G.01, Ground Floor, City Hall, 115 Charles
Street, Leicester, LE1 1FZ**

Members of the Committee

Councillor Dr Barton (Chair)
Councillor Unsworth (Vice -Chair)

Councillors Bajaj, Govind, Halford, Shelton and Thalukdar

One Unallocated Non-Grouped Place

Members of the Committee are invited to attend the above meeting to consider the items of business listed overleaf.

For Monitoring Officer

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Further information

If you have any queries about any of the above or the business to be discussed, please contact Anita James, **Democratic Support on (0116) 454 6358** or email Anita.James2@leicester.gov.uk or call in at the City Hall.

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PUBLIC SESSION

AGENDA

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1. APOLOGIES FOR ABSENCE

2. DECLARATIONS OF INTEREST

Members are asked to declare any interests they may have in the business to be discussed.

3. MINUTES OF THE PREVIOUS MEETING

Appendix A

The Minutes of the previous meeting of the Heritage, Culture, Leisure and Sport Scrutiny Commission held on Thursday 30th July 2015 have been circulated, and Members will be asked to confirm them as a correct record.

4. PETITIONS

The Monitoring Officer to report on the receipt of any petitions submitted in accordance with the Council's procedures.

5. QUESTIONS, REPRESENTATIONS, STATEMENTS OF CASE

The Monitoring Officer to report on the receipt of any questions, representations and statements of case submitted in accordance with the Council's procedures.

6. FESTIVAL AND EVENTS REVIEW

The Head of Museum's to provide a verbal update on the Festival and Events Review.

7. GREAT CENTRAL RAILWAY MAIN LINE PROJECT

Appendix B

Lili Tabiner, Great Central Railway presents a report outlining details of the project to include progress and funding information.

Bill Ford, Managing Director of the Great Central Railway will be invited to address the commission and respond to questions.

The Commission are invited to discuss and note the contents of the report.

8. ECONOMIC IMPACT OF RICHARD III **Appendix C**

The City Centre Director submits a report giving details of the economic impact of Richard III on the tourism and visitor economy in the city during the period from the discovery to the re-interment.

9. WORK PROGRAMME **Appendix D**

Items for the work programme to be discussed and consideration given to scheduling future items.

10. ANY OTHER URGENT BUSINESS

11. DATE OF NEXT MEETING

To note the date of the next meeting:

Thursday 29th October 2015 at 5.30pm.



Leicester
City Council

Appendix A

Minutes of the Meeting of the
HERITAGE, CULTURE, LEISURE AND SPORT SCRUTINY COMMISSION

Held: THURSDAY, 30 JULY 2015 at 5:30 pm

P R E S E N T :

Councillor Dr Barton (Chair)
Councillor Unsworth (Vice Chair)

Councillor Bajaj
Councillor Govind

Councillor Halford
Councillor Shelton

Councillor Thalukdar

In Attendance:

Councillor Clair, Assistant Mayor – Culture, Leisure and Sport

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1. APOLOGIES FOR ABSENCE

There were no apologies.

2. DECLARATIONS OF INTEREST

Members were asked to declare any disclosable pecuniary or other interest they may have in the business on the agenda.

There were no declarations.

3. MINUTES OF THE PREVIOUS MEETING

RESOLVED:

That the minutes of the meeting held on 19th March 2015 had been circulated and were agreed as a correct record.

4. PETITIONS

The Monitoring Officer reported that no petitions had been received.

5. QUESTIONS, REPRESENTATIONS, STATEMENTS OF CASE

The Monitoring Officer reported that no questions, representations or statements of case had been received.

6. MEMBERSHIP OF THE HERITAGE, CULTURE, LEISURE AND SPORT SCRUTINY COMMISSION

The Membership of the Commission was noted as follows:

Councillor Dr Barton (Chair)
Councillor Unsworth (Vice Chair)
Councillor Bajaj
Councillor Govind
Councillor Halford
Councillor Shelton
Councillor Thalukdar

1 unallocated non Group place

7. MEETINGS OF THE HERITAGE, CULTURE, LEISURE AND SPORT SCRUTINY COMMISSION 2015/16

The following dates and times of meetings were confirmed for the forthcoming year:

Thursday 24th September 2015
Thursday 20th October 2015
Thursday 10th December 2015
Thursday 4th February 2016
Thursday 31st March 2016

All at 5.30pm.

8. TERMS OF REFERENCE

The Terms of Reference for the Heritage, Culture, Leisure and Sport Scrutiny Commission were noted.

9. RUGBY WORLD CUP

The Director of Culture and Neighbourhood Services gave a presentation and verbal update on arrangements and events surrounding the Rugby World Cup (RWC).

Representatives were invited to address the commission and the committee had regard to the following points made in the course of discussion:

- The King Power stadium had been chosen as one of the venues, during the tournament it would be known as Leicester City Stadium and three games would be held there;

- The independent Ernst Young Economic Impact report commissioned by England Rugby 2015 estimated that the benefit to Leicester of being a host city would be £59 million based on a scale, although hard to predict a figure and the Council's estimates had been significantly lower. What was certain was there would be significant economic benefit to the city;
- The project governance board involved RWC, colleagues from across the Council were working closely with colleagues at the football club and other agencies;
- Leicester's competitive bid had secured their place as one of the host cities and the council's host city budget was £490,000 with external funding of £11,000 from ER2015 for the "Trophy Tour and Spectacular" and additional funding of £195,000 from funding partners for Leicester's Cultural Programme;
- Costs would be incurred for security, dressing the city, the "Fanzone" at Victoria Park with the benefits of that being paid back many times over;
- As well as affordable tickets, 500 tickets would be used to recognise and reward children, young people, volunteers and groups from the rugby community. £5k was allocated for tickets to be made available to Looked After Children and their carers which would be distributed through children's services;
- Of the key milestones still to achieve training would commence for the 50 Fanzone volunteers in July and the Trophy Tour would begin 13th – 15th August with the Webb Ellis Rugby World Cup touring Leicester and Leicestershire and events being held at the National Space Centre, Judgemeadow Community College, Clock Tower and City Hall;
- The Fanzone would be a key facility for Leicester from 3rd to 11th October at Victoria Park with an estimated 5000 attendees each day with matches being shown live on large screens, involving opportunities to try sports, and an entertainment programme;
- Transport had been carefully considered, there would be national publicity on travelling to matches. Two park and ride sites would be available at Birstall (600 spaces) and the Racecourse (800 spaces) together with a park and walk site at Saffron lane;
- Volunteers would staff the railway station to guide and welcome people to the city, most hotels were city centre based and the council had worked with city businesses to promote the hotel offer, so far 2 hotels were fully booked for the period, 1 was over booked and 1 was nearly fully booked;
- In relation to commercial activity, marketing and promotion there would be 99 banners, bunting and fence scrim around the city together with a

similar voucher campaign that was used to promote business during the KRIII event. 30,000 guides to Leicester were also being published;

- The legacy would come from the work done in schools and rugby clubs, increased facilities, tag rugby in primary schools and teacher development as coach development;
- A programme of 50 cultural events would start 2nd October to 11th October with The Night of Festivals event on the first weekend from Friday evening to Sunday evening and the Big Screen in place to screen matches live;

Officers indicated that they were willing to respond to any detailed questions via email.

The Chair thanked the invitees for their attendance.

10. OVERVIEW OF THE HERITAGE, CULTURE, LEISURE AND SPORT PORTFOLIO

The Director of Culture and Neighbourhood Services together with the Director of Local Services and Enforcement presented information about the service areas covered by the commissions portfolio and matters that were currently in development.

Members were asked to note the presentation which would help them to set the commission's work programme for the forthcoming year.

Members commented that it would be useful to be given more budget and economic details to see what areas would be impacted under this portfolio.

The Chair congratulated all those involved in achieving prestigious green flag status in Parks.

RESOLVED:

That the comments be noted.

11. PARKS AND OPEN SPACES SERVICE - UPDATE

The Director of Local Services and Enforcement submitted a report giving an update on the Parks and Open Spaces service.

The Head of Parks and Open Spaces gave a presentation on the Council's Parks service and Bereavement services and gave an update on the key areas of responsibility for those services.

The Head of Parks and Open Spaces further reported that:

- Parks warden service had been reintroduced to address public concerns

- of crime and anti-social behaviour in the parks;
- Services had been restructured into operational and local areas split into clusters of wards with main function bases at Evington House and Leycroft Road depot;
- As well as operational cemeteries the service managed and maintained closed cemeteries and church yards;
- Although the number of parks officers had been reduced there were now parks wardens instead creating a team on duty from 9am to 8pm in summer and having key people with responsibilities;
- In terms of parks development more promotional activity of sites was planned and each would have its own management plan;
- Community consultation was important e.g. 17 new green gyms were to go out and those would be subject to consultation process. The service would also be looking to increase activities with schools to promote educational activities and awareness of issues such as littering;
- 22% of the city was parks and opens spaces which was a large area to cover;
- A key impact on resources was site security, which included preventing unauthorised access e.g. travellers, and fly grazing of horses which ran alongside the traveller issue. At any one time there were 80 fly grazing horses across council land and the service was now operating a zero tolerance policy to remove them from parks land;
- There was improved volunteer co-ordination, community engagement was being developed and encouraged and the parks service were working closely with restorative justice e.g. painting Abbey park railings;
- Love Leicester Action Plans were to be introduced, City Wardens would lead on that and those would be brought to ward community meetings;
- The recent review did not impact on grounds maintenance and in terms of standards there was no threat to service;
- Improvements in parks facilities had been demonstrated by achievement of green flag status and there had been big investments in terms of adding in with improvement on toilet projects, football, gyms and play areas.

The Chair congratulated the team on their achievements and especially on receiving a national award for best improvement in service from the Association for Public Service Excellence.

12. WORK PROGRAMME

A discussion took place on the work programme and members were asked to consider new items for inclusion.

The commission expressed an interest in a number of areas which included the following:

- Plans for Western Park Golf Club land,
- Economic impact of Richard III

- Football Investment Strategy
- Sports Review
- Belgrave Hall
- National Rail Museum extension
- Saffron Hill Cemetery extension
- Tourism

It was also suggested that the work programme could be developed as the year progressed and it became clearer what it would be useful to scrutinise.

RESOLVED:

That the above items be noted for inclusion in the work programme.

13. ANY OTHER URGENT BUSINESS

None.

The meeting closed at 7.25pm

Report to Scrutiny Commission

Heritage, Culture, Leisure and Sport

Date of Commission meeting: 24 September 2015

Main Line – Bridging the Nation

The Great Central Railway Heritage Museum at Leicester



Report by Lili Tabiner, Great Central Railway

Background

The Great Central Railway is the only preserved mainline heritage railway in the UK. It currently operates from Loughborough to Leicester over 8.5 miles of largely double track line with stations serving Quorn and Woodhouse, Rothley and Leicester North. Rescued from closure in 1976, it is now one of the leading tourist attractions in Leicestershire attracting over 130,000 visitors per year. With an annual turnover of £3m, it employs 60 people (full time equivalent) and is supported by over 600 active volunteers. Restored steam and diesel trains operate every weekend throughout the year, with additional mid-week running during school holidays. A calendar of special events – Peppa Pig, Heroes and Villains, Easter Bunny Eggstravaganza and Santa Specials attract large numbers of families with young children, whilst Steam and Diesel Galas enable GCR to showcase its fleet of iconic locomotives and carriages – often enhanced by visiting locos. The GCR also operates a thriving on-train catering business as well as cafes at each of its stations along the route. Commercially, the GCR offers testing facilities for the rail industry (where diesel locos can operate at up to 70 mph) and is used as a location for numerous films and TV programmes.

Introduction

Over the past 3 years, the GCR has begun a programme of expansion, focusing on 2 major infrastructure projects. The first project, Bridging the Gap will reinstate a missing 500 mtr section of track in Loughborough to reconnect two sections of the line and create an 18 mile heritage railway from Leicester to Ruddington (Nottingham).

The second project will see a new heritage railway museum built at GCR's terminus, Leicester North which is situated close to the Red Hill Roundabout and adjacent to the City Council owned Greenacres community facility (which GCR currently leases). The museum is a partnership between the GCR, Leicester City Council and the National Railway Museum (NRM) in York. Once built, the museum will house items from the National Collection relevant to the GCR, focusing on the story of railways and the significant part they played in shaping Leicester's economy and social and cultural heritage.

In May 2015, the museum – currently named Main Line – Bridging the Nation, was awarded a Round 1 pass from the Heritage Lottery Fund with a total of £10m to be allocated following the successful completion of the Development Stage which is now underway. This is the first time a project from Leicester has been awarded a HLF grant from its national major grant scheme and the success demonstrates the merits of a strong, mutually supportive partnership and a powerful narrative.

For the City of Leicester, this award represents another major accolade and recognition that the City is now regarded as a culturally rich tourist destination. The museum's location forms a natural 'Tourism Gateway' between the City and the County. Close to the many other attractions within the City, there are many opportunities to develop links with the National Space Centre, Abbey Pumping Station, the King Richard III centre and the Transport Museum.

The vision for the Main Line Museum is:

To create a new world class working heritage museum which showcases the Great Central Railway's rich heritage and brings part of the UK's national railway collection out of the cold, making it accessible to all. Through the working railway we will educate, entertain and engage people of all ages, backgrounds and interests whilst preserving one of the Country's most iconic feats of railway engineering to ensure future generations are able to experience and learn from the past.

In total, the museum project will cost £17.7m and once opened it is estimated it will almost double the number of visitors to the GCR from 130,000 to 250,000, create an additional 10 full time jobs within the railway, support a further 700 jobs across Leicestershire, contribute £44m to the local economy and provide 100 new volunteering opportunities.

The development of the museum at Leicester North is therefore a hugely exciting opportunity for GCR to add a new dimension to its existing offer and bring about a step change in its ability to engage wider audiences.

The aims of the museum project are:

- To create a nationally significant museum which operates alongside an operating mainline heritage railway
- To conserve and increase access to GCR/NRM artefacts which are currently at risk
- To conserve and increase access to the National Railway collection
- To educate the public on the history of the Great Central Railway and the wider development of the railway network – emphasising their contribution to the economic and social heritage of the City of Leicester, Leicestershire and beyond
- To preserve and increase access to the UK's only Mainline Heritage Railway
- To increase visitors and frequency of visits
- To increase engagement of underrepresented groups in the community through an inclusive interpretation programme of events and activities
- To promote Science, Technology, Engineering, Arts and Maths (STEAM) amongst young people

- To increase access to skills and training in rail engineering, construction, operations, rail testing and rail management
- To increase the cultural offer in the city through creating a tourism gateway between the County and the City
- To develop strong partnerships and working relationships with other local attractions, social and community groups, educational establishments and special interest organisations
- To reinforce the City and the region as a centre for engineering excellence
- To increase the numbers of volunteers and improve their skills and development.

The Building and Exhibition Space

The museum, on a prominent, elevated site, will be visible from the A6 outbound and from the A6 inbound approach via Birstall. This provides an opportunity to construct an innovative, exciting, modern building utilising the best materials to create both a powerful landmark and in turn, offering visitors within spectacular views across the city sky scape. Uniquely, the Museum will have an operating heritage railway running alongside the museum’s floor-to-ceiling glass walls to truly demonstrate how railways work.

The new exhibition space will use the best interactive digital technology to tell the story of railways in Leicester and Leicestershire past, present and future for the first time in the region. Famous vehicles and other items from the National Railway Collection will form the core of the new displays and will be woven together by the threads of a narrative, allowing visitors to establish their own connections to the story of the industry and railways of the region.

Emerging stories, drawn from preliminary consultations with local community groups and individuals, range from day trips to the seaside, the movement of coal from Leicestershire extensive mines to the construction of railways in India and East Africa – part of the journey to Leicester for many of the City’s migrant community.

Strategic partnerships with the University of Leicester, DMU, community groups and schools will ensure that exhibits not only celebrate the past but also showcase new technological developments which the rail industry is developing to revolutionise train operation in the future.

The Greenacres complex which includes a restaurant, training rooms and offices, will be incorporated into the museum’s facilities –offering opportunities for educational activities, outreach community engagement, temporary exhibitions and digital archiving. The University of Leicester is working with GCR to explore ways of drawing in EU funding to support these activities.

Partnership

A Memorandum of Understanding underpins the current partnership between the GCR, Leicester City Council and the NRM. From the start, Leicester City Council has assisted GCR in a number of important areas. Financially, the Council has provided £95,000 towards the cost of the developing and submitting bids to the HLF (the first submission in Nov 2013 was unsuccessful but received encouraging feedback) and also by agreeing to fund approximately £180,000 improvements on the Red Hill allotments which are adjacent to the museum site (releasing 7 plots for the museum development). This is agreed in principle with the allotment society but is subject to statutory approvals, which are currently being sought. In addition, officers from the City Council are assisting GCR (which has limited internal capacity) in its management of the HLF project as well as providing strategic direction in terms of developing the new museum.

Meanwhile, the NRM is providing museum mentors, sourcing artefacts, exhibits and archive materials and will administer the loan agreements and conservation requirements.

Funding

The HLF process consists of 2 stages; a Development Stage lasting up to 2 years during which the early concept designs are developed to a point where a developer can be appointed and a Delivery Stage during which the museum will be built and opened to the public.

The total Development Stage costs are £1,097,338. GCR has been granted £494,500 from the HLF and has matched this with £323,000 from its own funds. The remaining £279,888 consists of in-kind/non-cash contributions and volunteer time.

The total cost of the Delivery Stage is £16,680,859.

The HLF has earmarked £9,504,900 leaving £5,370,084 cash match funding to be secured and a further £1,805,875 in non-cash/in-kind and volunteer time contribution. The LLEP has received an Expression of Interest to provide LGF funding towards the £2.5m public funding contribution.

The total project cost is £17,778,137

Key dates

Notification of Round 1 Pass	May 2015
Permission to Start	September 2015
Recruit Project Managers, Architect, Design Team, Exhibition Design team	December 15 – March 2016
End of Development Stage (RIBA 3)	April 2017
Submit Round 2 Application	April 2017
Round 2 Approval	July 2017

Construction
Opening

April 2018 – July 2019
Oct – Dec 2019

Conclusion

The new museum will form an important part of Leicester City's tourism offer and the project is a key priority within the Leicester City Tourism Action Plan. The economic benefits will contribute to the LLEP's Strategic Economic Plan and its recently commissioned Tourism and Hospitality Sector Growth Plan.

The Discovery of King Richard III in Leicester

The Economic Impact of Richard III on the Tourism and Visitor Economy in the period from Discovery to the Re-interment (September 2012 to March 20th 2015)

May 2015
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Appendix C

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PROJECT: The Discovery of Richard III in Leicester

DOCUMENT TITLE: Economic Impact Assessment

DATE: April 2015

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Summary of Key Findings

The table below shows the economic impact of the discovery of Richard III on the visitor economy in Leicester from the time of discovery to immediately before the week of activities surrounding the re-interment. The figures are based on the best available data at the time of producing the report and the previous experience of Focus Consultants using industry accepted methodologies.

The findings should be further tested when additional visitor number and spend data for this time period have been produced. To ensure the accuracy of the data we would also recommend that the calculations are further tested following the availability of primary data from both visitors and local businesses. This is further discussed later in the report.

Economic Benefits to Leicester as a result of the Discovery of King Richard III	
Outcomes	Additional Economic Impact
Actual Increase in Visitors 2012-2013	2.6%
Assumed Increase in Visitors 2012-2014	5.0%
Additional Visitors Attracted to Leicester overall	830,083
Additional Visitors Attracted to Leicester as a result of Richard III	622,562
Additional Visitor Spend in the Leicester as a result of Richard III	£54,625,048
Additional FTE Jobs Created in Leicester as a result of Richard III	1,012
Impact on Gross Value Added (GVA) in Leicester as a result of Richard III	£79,082,740
Value of Richard III Volunteering to Leicester as a result of Richard III	£118,566

The economic impact of this discovery will clearly be ongoing. The above figures should be continued to be monitored by the partnership over future years to understand the longer term impacts of the discovery on Leicester.

1.0 Introduction

In August 2012, the University of Leicester, in collaboration with the Richard III Society and Leicester City Council, began one of the most ambitious archaeological projects ever attempted: no less than a search for the lost grave of King Richard III. The last English king to die in battle.

Incredibly, the excavation uncovered not only the friary of Grey Friars but also a battle-scarred skeleton with spinal curvature. On 4th February 2013, the University announced to the world's press that these were the remains of King Richard III.

Source: University of Leicester Website 2015

As well as solving one of the country's last remaining historical mysteries this discovery has also put the media spotlight on Leicester – over 140 media organisations from across the globe are anticipated to cover the re-interment.

As highlighted by one of the stakeholders interviewed:

'The discovery of Richard III has singularly put a pin in the map for Leicester, a place where no one was even looking for a pin in the past. As stewards of the county we now have a responsibility to make the most of this legacy.'

Quote from stakeholder - March 2015

Within the short period since the discovery, the partners involved in the discovery have already begun to develop this Richard III legacy for the city. This includes the creation of a new visitor centre and the re-interment of the remains within Leicester Cathedral.

These developments, and other benefits derived from the discovery such as the media coverage and increased profile of the city, will all have an impact on the economic situation for Leicester and its residents. Indeed, there has already been a considerable amount of discussion surrounding this topic including:

'Since the discovery of the body of King Richard III in 2012, we've seen a significant rise in interest in Leicester and in the number of visitors coming here.... People have come from all over the world to explore his story in the city and the surrounding area. This interest in Leicester will grow further with the recent opening of the King Richard III Visitor Centre and after the king is reinterred in Leicester Cathedral in March 2015.'

Leicester Tourism Action Plan 2015-2020

1.1 Purpose

The purpose of this economic impact assessment document is to capture the economic benefits that the discovery of King Richard III has had on the visitor economy of Leicester from the discovery to the week before the re-interment. Excluding the actual week of the re-interment is deliberate. In this unique period, Leicester benefited from unprecedented and probably never to be repeated levels of visitors. Concentrating on the earlier period will allow partners to set more realistic targets for capturing the economic legacy going forward.

This report uses qualitative and quantitative data to capture both the tangible and less tangible benefits of the discovery:

- Tangible: e.g. revenue generated job opportunities and
- Less Tangible: e.g. enhanced image, improved partnerships.

The report also sets a framework for measuring the economic benefits into the future, ensuring that the legacy of Richard III can continue to be monitored. A toolkit has also been produced which provides a step-by-step approach to calculating the ongoing Economic Impact of the discovery of Richard III on the Leicester Economy beyond the period reviewed by this report.

2.0 Methodology

The methodology used to undertake this work has been outlined below.

2.1 Timeline Analysis and Consultation

This section first analyses the timeline of related activity following the discovery of Richard III.

It then highlights information collated through consultation with local partners and stakeholders and through an analysis of relevant strategies, to begin to capture the economic legacy of the discovery of King Richard III on Leicester's visitor economy.

The information from the timeline analysis and consultation has then been analysed to pull out the key areas of economic benefit that the discovery of Richard III has had on the city and for its residents.

2.2 Estimating Visitor Growth

This section uses available data to make assumptions about the increase in visitor numbers to Leicester since the discovery of Richard III.

It investigates the change in position for the city with regards to a variety of economic factors since the discovery of Richard III in Leicester. The findings are then used to quantify the assumed increase in visitors to the city – these figures are then further applied in the later economic impact assessment calculations.

2.3 Economic Impact Calculations – Quantifying the Economic Impact of Richard III on Leicester's Visitor Economy

This section outlines the approach that has been taken to estimating the economic impact of the discovery of Richard III on the Leicester Economy.

It provides a review of the key features of the economic impact methodology and terminology used and details the calculations undertaken.

Two subsections have been considered within this analysis:

- The Economic Impact of the Temporary Exhibition on Leicester
- The Economic Impact of the new Visitor Centre.

3.0 Timeline Analysis and Consultation

To understand the impact that Richard III has had on Leicester we must first understand the timeline of the discovery, how the story has been shared with the public and the investments made by partners and stakeholders. This information has been taken from the Leicester City Council Website and from www.richardinleicester.com.

3.1 Timeline of Discovery

February 2013:

- The University of Leicester announces that the skeleton exhumed is, beyond reasonable doubt, King Richard III.
- First screening of Richard III: The King in the Car Park – Channel 4 documentary telling the story of the excavation and scientific investigation.
- A reconstruction of King Richard's head, commissioned by the Richard III Society and created by experts from Dundee University, is unveiled.
- Leicester City Council launches 'Window Walk' – an outdoor exhibition screening empty shop fronts, which tell the story of Richard III.
- Richard III: Leicester's Search for a King exhibition opens at the Guildhall.
- Richard III short break packages launched by Leicestershire Promotions.
- Blue Badge Guide walking tour of King Richard III Leicester begins.
- Exhibition depicting the life of Richard III opens at Bosworth Battlefield.

March 2013:

- Richard III travelling exhibition visits city libraries.
- Visitor figures at Bosworth Battlefield Heritage Centre almost double.

April 2013:

- 50,000th visitor welcomed to temporary exhibition.

June 2013:

- City Mayor reveals plans to move Leicester's monument to Richard III from Castle Gardens to a new public garden to be created at Leicester Cathedral.
- A facial reconstruction of King Richard III, created by forensic artists goes on tour of the UK, starting at Leicester's Guildhall.
- Leicester City Council launches new programme of events to celebrate the life of Richard III, including guided walks and talks with key archaeologists.

July 2013:

- The University of Leicester win HEIST Award for education for the Search for Richard III marketing campaign.
- A new Cathedral Quarter Partnership – made up of the city and county councils, Leicester Cathedral and the University of Leicester – is formed.

August 2013:

- Construction begins on Leicester's £3.9 million Jubilee Square - a modern space which will connect the city's retail area with historical gems including The Guildhall and Leicester Cathedral – as well as the King Richard III Visitor Centre.

September 2013:

- More than 400 visitors book on to Leicestershire Promotions' one-day 'The King's Tour'.
- A Richard III walking trail is launched.

- A new Pitkin Guide Book entitled Richard III: The Leicester Connection is launched.
- Leicestershire County Council leader announces plans to contribute £250,000 towards the redevelopment of Cathedral Gardens, including a £75,000 piece of public artwork.

November 2013:

- Work begins to transform Leicester Cathedral's gardens and to reconstruct nearby Peacock Lane and St Martins.
- Construction work begins on the £4 million King Richard III Visitor Centre.
- The University of Leicester is awarded the Queen's Anniversary Prize for Higher and Further Education for inter-connected research and expertise in history, heritage and archaeology, highlighted by the discovery of Richard III.
- Richard III: Leicester's Search for a King exhibition at the Guildhall declared runner up in the Tourism Experience of the Year at the Leicester and Leicestershire Excellence in Tourism Awards.

December 2013:

- The University of Leicester is awarded Research Project of the Year at the Times Higher Education Awards for work on the discovery of Richard III.
- 150,000th visitor is welcomed to Richard III: Leicester's Search for a King Exhibition at the Guildhall.

January 2014:

- Great British Railway Journey's screens on BBC 1 and features a visit to where Richard III's skeleton was exhumed from the Greyfriars Church.
- Richard Buckley, Leader of dig for Richard III is nominated for Archaeologist of the Year 2014.
- Designers, Dallas Pierce Quintero, chosen to produce the piece of artwork for Cathedral Gardens.

July 2014:

- KRIII Visitor Centre Opens its doors for the first time.

August 2014:

- Work begins in the Cathedral, making alterations ready for the re-interment.

September 2014:

- Announced that the Cardinal Archbishop of Westminster and the Archbishop of Canterbury will both be taking part in services in Leicester Cathedral to mark the re-interment of Richard III.

October 2014

- King Richard III Composer Commissioned.

November 2014:

- The King Richard III Visitor Centre in Leicester wins the UK category of the 'British Guild of Travel Writers' Top Annual Tourism Awards.

December 2014:

- Online ballot for 200 invitations for each of the three King Richard III services in Leicester Cathedral.
- Analysis of all the available evidence confirms identity of King Richard III to the point of 99.999.

January 2015:

- The King Richard III Visitor Centre named as one of the world's hottest new attractions for 2015 by travel guide Lonely Planet.

February 2015:

- The King's cortege procession route announced for a ceremonial procession bringing King Richard III's remains to their final resting place in the Cathedral.

March 2015:

- Channel 4 announces reburial coverage plans, including a week of special services.

Source: Leicester City Council Website and www.kingrichardinleicester.com

3.2 Timeline Summary

From a review of the timeline we can begin to understand the key areas of impact that the discovery of Richard III and the subsequent events have had on the Leicester economy. These are:

- Tourism Impacts and Visitor Numbers
- Employment Opportunities
- Civic Pride and Profile of the City
- Profile of the University
- Impact for the Cathedral
- Partnerships and Stakeholder Links
- Business Impacts.

Each of these key areas of impact has been considered in more detail over the following pages.

Research on these areas was undertaken through consultation with stakeholders and a request for information amongst project partners to collate data in these areas to inform the work. A variety of quantitative and qualitative work was collected.

The information was supplemented by a high level review of relevant strategy.

3.3 Data Gathered through the Consultation and a Request for Information from Project Partners

Data was gathered from a range of organisations including:

- Leicester City Council
- Leicester Cathedral
- University of Leicester
- Richard III Visitor Centre
- East Midlands Chamber
- Leicestershire Promotions

3.3.1 Key Areas of Impact

The key findings from the review are shown below:

3.3.2 Profile of the City

The project has clearly raised the profile of Leicester – evidence of this is highlighted below:

- There has been significant documentary coverage on Channel 4.
- The re-interment is expected to be covered by 140 global media organisations.
- Listing in the travel guide Lonely Planet.
- The Temporary Exhibition in the Guildhall

As one stakeholder highlighted:

'The city will never be the same again'

Quote from stakeholder - March 2015

Information from the University of Leicester on the value of the media coverage for Richard III is shown below. The information covers the two month period following the press conference confirming that the remains were those of Richard III.

- Articles appeared in publications in 27 different countries, this included 46 articles in the USA.
- The Advertising Value Equivalency (AVE) of this was estimated at £521,530. Advertising Value Equivalency (AVE) is what editorial coverage would cost if it were advertising space (or time).
- The readership of these publications is 299,792,749.

Source: The University of Leicester

Information from the University of Leicester also highlights that *'Following the press conference confirming the Royal identity in February 2013 'Richard III' and 'Leicester' trended on Twitter for 24 hours as breakfast TV and morning papers reported the story in successive time zones. That evening's Channel 4 documentary on the project was the broadcaster's highest rated show of the year. The equivalent value of the international media coverage generated by all this has been calculated at £2 million.'*

Source: The University of Leicester

The University of Leicester have provided the following Richard III-related social media stats for @UoLNewsCentre.

- 113 of these included pictures
- 16 of these included videos
- Richard III tweets were favourited 861 times
- They were retweeted 1,300 times, often by journalists or news accounts
- 241 new accounts followed us, taking the total up to 1,068, representing a 29% increase in followers

Source: The University of Leicester

The discovery has also gained the following social media coverage and followers:

- Facebook.com/kingrichardleicester was set up in August 2012 and as March 2015 has 3,819 likes.
- Twitter.com/RichardIIILeics was set up in October 2012 and as of March 2015 has 2,745 followers.

Source: Leicestershire Promotions, Go Leicestershire

As one stakeholder highlighted:

'You can't buy that sort of publicity'

Quote from stakeholder - March 2015

The impact on the University Press Team was highlighted as 'transformative'. As a result of the discovery the team have started producing their content which broadcasters are using in their own right. They used a variety of media forms to help spread the message, including one of the professors who did some work around what Richard III might have sounded like and this was covered by news teams across the world.

3.3.3 Impact on Visitor Numbers to Leicester – Richard III Attractions

Feedback from stakeholders also shows that the discovery of Richard III has had a positive influence on tourism in Leicester.

As highlighted by one stakeholder:

‘Richard has gained global attention – with the addition of Richard III, Leicester now has the beginnings of a heritage cluster – It is building up a portfolio of an offer for tourists’

Quote from stakeholder - March 2015

Leicester is geographically well placed to capitalise on the discovery of Richard III in terms of attracting additional visitors as:

- 26 million people live within a two hour drive of Leicester.
- Significant transport links with Leicester being just over an hour from St Pancras International, London.
- The greatest frequency of trains of any East Midlands location.
- Links to Europe via Channel Tunnel available from the same London station.
- Cross country links from Birmingham, Peterborough and beyond.
- Close proximity and good connections from two M1 junctions.
- Strong cross-country links (by Road eg A50, A14)
- East Midlands Airport.

Stakeholders have provided us with the following information on visitor numbers to Richard III attractions:

a. The Richard III Archaeological Dig Open Days

- 6,880 people viewed the Richard III dig site when it was opened to the public for 6 days in September 2012.

b. Visitors to the Temporary Exhibition

- The Richard III Temporary Exhibition opened on 8th February 2013 and ended on 8th June 2014. During this period the Guildhall had 201,653 visitors.
- Survey data from visitors to the temporary exhibition demonstrates that there is a great deal of interest in Richard III outside of Leicester itself. From April 2013 - March 2014, 31% of visitors came from the county and 46% came from other parts of the UK and abroad.

As one stakeholder highlighted:

‘The Temporary Gallery was a great success – There were huge queues when it opened’

Quote from stakeholder - March 2015

c. Richard III Visitors Centre Visitors

- Since opening on 26th July 2014, to 7th March 2015, total visitors have been circa 40,000. Approximately 800 school children have visited.
- Of the UK visitors, a large proportion come from within the LE postcode area, with areas along the M1 corridor also well represented, particularly Nottinghamshire and Northamptonshire.
- Overseas visitors have been well represented from around the world including the USA, Canada, Australia, New Zealand, Germany, Holland, and Sweden.

d. Cathedral

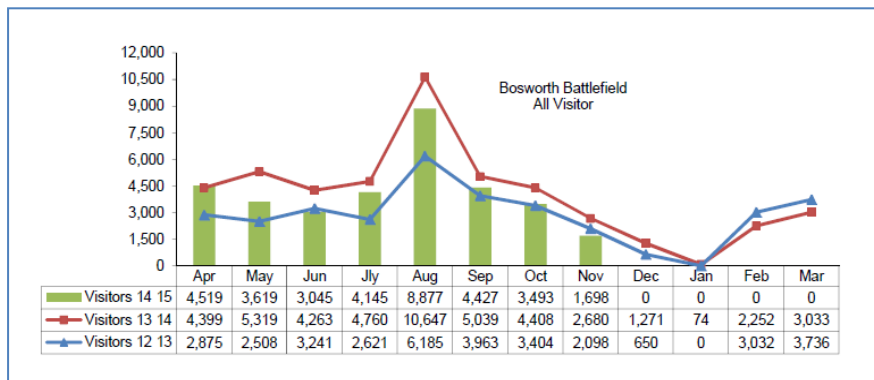
- Staff at the Cathedral highlighted that many people who visit the exhibitions also visited the Cathedral.
- This is supported by visitor statistics captured through an onsite questionnaire which showed that 58% of people surveyed who visited the temporary exhibition also visited the Cathedral.

3.3.4 Impact on Other Tourism Attractions

The increase in visitors relating to Richard III could also have an impact on other attractions in the wider Leicestershire area.

Visitor consultation at the temporary exhibition shows that 37% of the people surveyed who visited the temporary exhibition also visited Bosworth Battlefield.

Visitors to Bosworth Battle Field can be seen in the table below – there was a clear increase in visitor numbers in 2013/2014.



The fact that visitors may combine their trip with a visit to an attraction outside of Leicester needs to be reflected in our economic impact calculations later in the

report. Some of the benefits of the discovery will be felt outside of Leicester and in the wider county.

3.3.5 Employment

The employment impacts of the discovery of Richard III could be direct – i.e. through new jobs in the visitor attractions, or indirect jobs i.e. created through additional visitor spend and associated supply chains.

These new jobs will help to create opportunities for Leicester residents, particularly young people and those unable to work full time as we know that:

- The sector is a significant source of employment for those unable to work full-time – almost 48% work part-time, compared with the UK average of 18%.
- The average UK business has 19% of its staff aged under 30. Tourism businesses have 39%.
- 35,600 new apprenticeships were created in hospitality during 2013.

Source: The Voice of Tourism Report (2014)

a. Direct Jobs

Consultation with stakeholders has identified the following direct job opportunities that have been created or would be created in future as a result of Richard III.

These jobs have been highlighted from speaking to a sample of stakeholders. We would suggest that a further audit is undertaken to ensure that all new jobs are captured.

b. Indirect Jobs

The Tourism, Growth and Jobs Report – Deloitte (2013) identified that: *Since 2010 tourism has been the fastest growing sector in the UK in employment terms and was responsible for one-third of the net increase in UK jobs between 2010 and 2012. 900,000 jobs were created. Almost 300,000 were in Tourism.*

Source: Tourism, Growth and Jobs Report – Deloitte (2013)

In addition to this the city council also revealed in October 2014 that: *'More than 3,400 jobs have been created in the city since the launch of Leicester's Economic Action plan two years ago'*

Source: Leicester City Council

If we apply the national trends to these figures it would suggest that of these 3,400 jobs created in Leicester approximately one third (1,133) were created in the tourism industry. Many of these could be as a result of Richard III – this will be further tested later in the report.

3.3.6 Volunteering Opportunities

Consultation with stakeholders identified the following volunteering opportunities that had been created as a result of Richard III.

a. Richard III Visitor Centre

The Richard III Visitor Centre currently has approximately 30 volunteers.

b. Temporary Exhibition

It is anticipated that there were 1,235.5 hours of volunteering in the exhibition and events around the exhibition.

c. Cathedral

Discussions with the Cathedral highlighted that they have recruited volunteers quite seriously as a result of RIII. They have also taken a more professional approach to recruiting and managing their volunteers.

They estimate that they have probably taken on about 50 volunteers as a result of the discovery of Richard III, up from a core team of about 12.

3.3.7 Partnerships

The timeline of activities highlights the formation of the new Cathedral Quarter Partnership, made up of leaders from the city and county councils, Leicester Cathedral and the University of Leicester.

Stakeholders told us that this partnership has been very successful in delivering the Richard III projects. It was particularly noted that the City and County had a very strong working relationship on the project.

The Cathedral highlighted that their religious viewpoint on the partnership was respected by partners.

The University also highlighted how the strength of this partnership has enabled

the successful delivery of the scheme, highlighting that there are not many groups who could develop a high quality visitor centre in such a short space of time.

3.3.8 Profile of the University

Consultation with stakeholders highlighted that the University of Leicester had managed their role in the discovery well.

As one stakeholder highlighted:

'University has handled it with aplomb'

Quote from Stakeholder - March 2015

Discussions with the University press team highlighted how the profile of the University had been raised in terms of both the academia and the university's ability to deliver high profile projects.

'It has changed the way people perceive the University'

Quote from University - March 2015

This success has also been noted in the press. In March 2014, The Guardian stated the following:

'The discovery of Richard III's body underneath a Leicester car park was one of the most successful UK university media operations ever.'

Source: Guardian March 2014

Earlier, in February 2013 when the University first announced the discovery, The Guardian described it as

'The most extraordinary press conference ever held at any UK university.'

Source: Guardian February 2013

Discussions with the University of Leicester also highlighted the following:

'Richard III was undoubtedly a pinnacle for the organisation and the School of Archaeology and Ancient History. It won plaudits from archaeologists and historians, and resulted in a significant rise in enquires (119%) to study archaeology.'

On the back of this publicity, the University's reputation, measured through its regular tracking, increased from 5.8 to 6.2 out of 10 – "passing" a number of competitors.'

Source: University of Leicester - March 2015

4.0 Visitor Numbers – Estimating Visitor Growth

Understanding the impact of the additional visitors to Leicester since the discovery will be crucial to understanding the economic benefits for the city.

Data on visitor numbers to Leicester is available for 2012 and 2013 which shows there was an increase of 2.6% in overall visitor numbers from 2012 to 2013. *Source: Leicester STEAM Report 2013.* However, this data is not yet available for 2014 or the early part of 2015.

To understand the total impact of the discovery of Richard III on Leicester we therefore need to make some assumptions about potential visitor figures for these years. This section outlines how we have estimated these figures, based on available data charting trends in the local economy and national tourism trends.

Statistics collated in the previous section were from a stakeholder and partner consultation exercise. Here we have pulled out the more economic statistics provided and combined them with an analysis of the local economic situation. We have used this information to assess the impact on the local economy in Leicester since the discovery of King Richard III. From this we have made some assumptions about estimated visitor numbers. Some of the data used is commercially sensitive and cannot be revealed in this report but the data that is in the public domain includes:

Retail

The number of retail businesses in Leicester has increased by 4.42% between 2011 and 2014 compared to just a 0.31% increase in the region.

Accommodation and Food Services

The number of accommodation and food services businesses in Leicester has grown by 9.8% since 2011 to 2014 compared to 2.56% in the East Midlands.

Arts, Entertainment and Recreation Businesses

The number of arts, entertainment and recreation businesses in the City has grown by 13.48% from 2011 – 2014 whilst in the East Midlands the growth has been just 0.4%.

Visits to Other Local Attractions

Visits to all City Museums and Heritage sites have increase by 11% from 2011/12 to 2013/14.

Hotel Occupancy Figure

There has been an increase in hotel occupancy from 2014 to 2015 in Leicester of 5%.

4.1 Implications for Visitor Numbers

Whilst recognising that there will be other factors influencing these changes, it can be reasonably assumed for the purpose of determining the likely economic impact that there has been between a 5-11% increase in activity in Leicester since the discovery of King Richard III - this will have resulted in a positive economic impact. This is shown below:

Drawing on the key data sources from partners that focus on the visitor economy we know that:

- There has been a 5% increase in occupancy rates from 2013 to 2014.
- Visits to City Museums and heritage sites have increased by 11% from 2011/12 to 2013/14.
- The number of accommodation and food service businesses in Leicester has grown by 9.8%.

Assuming that a proportion of the additional visitors will be from Leicester itself and therefore the economic impact will be minimal as they would have been spending their money in the city anyway then it would be reasonable to assume that there has been around a 5% increase in visitors to the City since the discovery.

This estimate is based on trend analysis as well as analysis of the data collected by partners.

We know from STEAM data that visitor numbers did not increase in the City in the last quarter of 2012. Therefore it can be assumed that the impact was not felt in the City until it was revealed that the remains excavated were those of King Richard III.

Therefore in the following sections, in order to calculate the economic impact of additional visitors to the City, we will look at the additional visitors in the City in 2013 compared to 2012 and estimate the number of additional visitors in 2014 compared to the baseline figures of 2012. We also estimate the visitor numbers for the first quarter of 2015, up to the 20th March.

5.0 Economic Impact Calculations – Quantifying the Economic Impact of Richard III on Leicester

This section outlines the approach that has been taken to estimate what the impact of the discovery of Richard III has been on the Leicester Economy.

It provides a review of the key features of the economic impact assessment methodology and terminology used and details the calculations undertaken.

We have particularly focussed the research on the quantifiable estimated economic impacts that the discovery has had on:

- Number of additional day and night visitors
- Increase in visitor spend
- Direct and indirect employment
- Gross Value Added (GVA).

As part of the research we have also quantified the economic value of the additional volunteering that has taken place in the city as a result of the discovery.

Within this research we have looked at two subsections:

- The Economic Impact of the Temporary Exhibition at the Guildhall
- The Economic Impact of the King Richard III Visitor Centre.

5.1 Economic Impact Assessment Principles

Before we detail the findings we have first highlighted below some of the key principles and features used in the economic impact calculations. We have also included a glossary of the terminology used.

a. Key Features of the Economic Impact Assessment

- The approach taken is rooted in HM Treasury 'Green Book' methodology, using a mix of relevant technical guidance and judgements, primary data or standard assumptions for key economic factors.
- When using data sources to inform calculations we have applied the following approach:
 - Use of primary sources where possible.
 - Where possible use of data from the project team.
 - Where primary data is not available we have used standard assumptions.

b. Economic Impact Terminology Used in the Calculations - Glossary

The research undertaken has been designed to estimate the total effect of the discovery of Richard III on the City of Leicester. This means considering a wide range of consequential or induced effects as well as the immediate effects.

Throughout the calculations a variety of factors have been applied to capture this – these are explained overleaf.

- **Multiplier effects:** The further economic activity (jobs, expenditure or income) that is associated with additional local income, local supplier purchases and longer term effects of the intervention. Multipliers can be both indirect and induced:
 - **Indirect:** The effects of purchases made as a result of the intervention, and further purchases associated with linked firms along the supply chain.
 - **Induced:** The effects associated with local expenditure as a result of those who derive incomes from the direct and supply linkage impacts of the project over a set period of time.
- **Deadweight:** The outputs that would have occurred without and regardless of the intervention.
- **Displacement:** The proportion of intervention outputs accounted for by reduced outputs elsewhere in the target area.
- **Leakage:** The proportion of outputs that benefit those outside of the intervention's target area or group.

5.2 Limitations of Economic Impact Assessments

It is important to recognise that there are limitations to any economic impact assessment. Below we have listed both the limitations that are applicable to all economic impact assessments and also limitations that are specifically relate to this study.

5.2.1 General Economic Impact Constraints

- The approach is constrained to a specific impact area.
- The findings are reliant on the robustness of the 'base case'.
- There is an inability to count non-quantifiable economic benefits that have value to individuals or organisations (e.g. quality of life improvements, profile raising, personal saving on travel time etc).

5.2.2 Project Specific Economic Impact Constraints

- At the time of the study, STEAM data was not available to quantify the 2014 tourism statistics for Leicester. Assumptions have therefore been made about these visitor figures based on available economic data – it is recommended that the economic impact calculations are reassessed when this STEAM 2014 becomes available.
- Due to limited timescales for the study some calculations have been based on informed assumptions. Where this is the case we recommend that further research needs is undertaken to verify these assumptions.

Not discounting all of the above it must be noted that the approach taken is cost effective, comparable and is built on economic convention.

5.3 Calculating the Number of Additional Day and Overnight Visitors to Leicester as a Result of Richard III

Calculating the number of additional visitors to Leicester that have visited as a result of the discovery of Richard III is crucial to understanding the economic impact the event has had on the city. The calculations shown over the following pages show the methodology undertaken for assessing this.

The calculations have been undertaken in two stages:

- Establishing the total number of increased visitors in general to Leicester following the discovery of Richard III.
- Determining the number of these visitors that occurred as a result of the discovery of Richard III.

5.3.1 Establishing the number of increased visitors to Leicester following the discovery of Richard III.

Data on visitor numbers to Leicester is available for 2012 and 2013 which shows there was an increase of 2.6% in overall visitor numbers from 2012 to 2013. *Source: Leicester STEAM Report 2013.* This data is not yet available for 2014 or the early part of 2015. We have therefore, made assumptions about potential visitor figures for these years based on available data charting trends in the local economy and national tourism trends. As explained in the previous section, in order to estimate visitor numbers for 2014, a 5% increase on the 2012 figures has been assumed. *(See section 5 for more details).*

Note: Visitor trends show that visitor figures had been falling in previous years. Assuming that visitor numbers stayed at their 2012 levels could be underestimating the visitor numbers. To be cautious we have assumed no further drop.

It is considered that the biggest increase in visitor numbers will have been between 2012 - 2013 and 2014 - 2015. After re-interment, the focus will need to be on sustaining these visitor numbers rather than necessarily increasing them further. However, we have assumed a further small increase in the first quarter of 2015, up to the start of the re-interment celebrations, due to visitors interested in the preparations for the re-interment 5,000 additional visitors have been assumed.

The tables below set out the actual and estimated visitor numbers to Leicester from January 2012 to March 2015 and are broken down by total visitors and day trip visitors.

Total Visitors to Leicester					
Year	Jan-Mar	Apr-June	July-Sept	Oct-Dec	Total Visitor Numbers
2012	2,536,087 <i>Actual</i>	2,156,721 <i>Actual</i>	2,224,131 <i>Actual</i>	2,321,950 <i>Actual</i>	9,238,889 <i>Actual</i>
2013	2,544,466 <i>Actual</i>	2,336,528 <i>Actual</i>	2,279,978 <i>Actual</i>	2,314,251 <i>Actual</i>	9,475,224 <i>Actual</i>
2014	2,662,891 <i>Estimate</i>	2,264,557 <i>Estimate</i>	2,335,337 <i>Estimate</i>	2,438,048 <i>Estimate</i>	9,700,833 <i>Estimate</i>
2015	2,667,891 <i>Estimate</i>				2,667,891 <i>Estimate</i>

Source: Actual Data from 2013 Leicester STEAM Report

i. Visitor Split – Day any Overnight Visitors

The table below shows how these visitors are split into day and overnight visitors.

Day and Overnight Visitors to Leicester						
Year	Day/ Overnight	Jan-Mar	Apr-June	July-Sept	Oct-Dec	Actual
2012	Day	2,315,654 <i>Actual</i>	1,874,482 <i>Actual</i>	1,857,087 <i>Actual</i>	1,966,319 <i>Actual</i>	8,013,541 <i>Actual</i>
	Overnight	220,433 <i>Actual</i>	282,239 <i>Actual</i>	367,044 <i>Actual</i>	355,631 <i>Actual</i>	1,225,347 <i>Actual</i>
2013	Day	2,296,433 <i>Actual</i>	2,054,481 <i>Actual</i>	1,910,696 <i>Actual</i>	1,961,708 <i>Actual</i>	8,223,319 <i>Actual</i>
	Overnight	248,033 <i>Actual</i>	282,047 <i>Actual</i>	369,282 <i>Actual</i>	352,543 <i>Actual</i>	1,251,905 <i>Actual</i>
2014	Day	2,431,436 <i>Estimate</i>	1,968,206 <i>Estimate</i>	1,949,941 <i>Estimate</i>	2,064,635 <i>Estimate</i>	8,414,218 <i>Estimate</i>
	Overnight	231,455 <i>Estimate</i>	296,351 <i>Estimate</i>	385,396 <i>Estimate</i>	373,413 <i>Estimate</i>	1,286,615 <i>Estimate</i>
2015	Day	2,435,436 <i>Estimate</i>				2,435,436 <i>Estimate</i>
	Overnight	232,455 <i>Estimate</i>				232,455 <i>Estimate</i>

Source: Actual Data from 2013 Leicester STEAM Report.

ii. Total Additional Visits made to Leicester since the Discovery

In this section we have used the actual and estimated visitor number figures to calculate the total number of ADDITIONAL visits made to Leicester since the discovery of Richard III. (Note: This is total visits, not just those resulting from the discovery).

In order to calculate the additional number of visitors to Leicester since the discovery, the visitor numbers for 2012 have been used as the “do nothing” scenario/ baseline position.

The tables show the additional number of people attracted to Leicester each year compared to the “do nothing”/ 2012 baseline position. This shows that between January 2013 and March 2015, there were an estimated 830,083 additional visitors to Leicester.

Total Visitors to Leicester			
Year	2012 Baseline visitor figures/ Do Nothing	Estimated Actual Visitor Number	Increase in visitor numbers from Do Nothing position
2012	9,238,889 <i>Actual</i>		
2013	9,238,889 <i>Actual</i>	9,475,224 <i>Actual</i>	236,335 <i>Actual</i>
2014	9,238,889 <i>Actual</i>	9,700,833 <i>Estimate</i>	461,944 <i>Estimate</i>
2015 (Jan-Mar)	2,536,087 <i>Actual</i>	2,667,891 <i>Estimate</i>	131,804 <i>Estimate</i>
Total additional visitors compared to the do nothing options			830,083

iii. Additional Day and Overnight Visits

The number of additional day visitors can be shown in the table below.

Total Additional Day Visitors to Leicester since 2012			
Year	2012 baseline visitor figures – Do nothing	Estimated Actual Day Visitor Numbers	Increase in visitor numbers from the do nothing position
2012	8,013,541		
2013	8,013,541	8,223,319	209,777
2014	8,013,541	8,414,218	400,677
2015 (Jan-Mar)	2,315,654	2,435,436	119,783
Total additional visitors compared to the do nothing options			730,237

Total Additional Overnight Visitors to Leicester since 2012			
Year	2012 baseline visitor figures – Do nothing	Estimated Overnight Visitor Numbers	Increase in visitor numbers from the do nothing position
2012	1,225,348		
2013	1,225,348	1,251,905	26,557
2014	1,225,348	1,286,615	61,267
2015 (Jan-Mar)	220,433	232,455	12,022
Total additional visitors compared to the do nothing options			99,846

iv. Total Additional Visitors to Leicester

The table below estimates the total additional visitors that have visited Leicester since 2012.

Total Additional Visitors to Leicester since 2012	
Visitor Type	Additional Visitor Numbers since 2012
Total additional visitors	830,083
Total additional day visitors	730,237
Total additional staying visitors	99,846

The next stage of the analysis is to understand how many of these visitors came to Leicester because of the discovery of Richard III.

5.3.2 Determining the number of visits that would have occurred regardless of the discovery of Richard III

We can estimate that an additional 830,083 visitors have come to Leicester since the discovery of Richard III.

The key questions we need to answer are:

- Why have these additional visitors come to Leicester?
- How many of them came because of Richard III?

A review of economic data, tourism statistics and publicity and press for Leicester across this period shows that undoubtedly the biggest single event that has impacted on the city was the discovery of Richard III.

We also know that:

- Previous trends before 2012 show a falling number of visitors to the city.
- From September 2012 to February 2015, 217,700 people visited the cathedral.
- Staff at the Cathedral estimated a six fold increase in visitor numbers.
- The RIII Temporary Exhibition opened on 8th February 2013 and ended on 8th June 2014. During this period the Guildhall had 201,653 visitors.
- 6,880 people viewed the Richard III dig site when it was opened to the public for 6 days in September 2012.
- The Richard III Exhibition has received circa 40,000 visitors since 26th July 2014.

Based on the above trends, the previous experience of Focus Consultants and discussions with partners we are therefore assuming that at least **75%** of the additional visitors came to Leicester as a result of the discovery of Richard III. We could assume a higher percentage here but for prudence we have assumed 75%. Again we would suggest that more detailed information can be captured from visitors in future so that these figures can be more accurately projected.

This equates to the following estimated visitor figures:

Total additional visitors to Leicester since 2012 attributable to the discovery of Richard III		
Visitor Type	Total Additional Visitors	Attributable to Richard III 75%
Total additional visitors	830,083	622,562
Total additional day visitors	730,237	547,678
Total additional staying visitors	99,846	74,885

From the information in this section we have assumed that an additional **622,562** people have visited Leicester as a result of the discovery of Richard III.

The calculations over the following pages calculate the economic impact of these additional visitors on the city.

5.4 Increase in Visitor Spend in the Local Economy as a result of Richard III

To calculate the increase in visitor spend on the local economy as a result of these additional visitors we must first take the number of visitors who are visiting as a result of Richard III and then multiply these by the anticipated spend per head of these visitors.

This visitor spend figure is then multiplied by a variety of factors to calculate its consequential effects, ensuring that we capture the total effect on the local economy. These are:

- **Multiplier effects:** The further economic activity (jobs, expenditure or income) that is associated with additional local income, local supplier purchases and longer term effects of the intervention.

This can include indirect and induced effects:

- **Indirect:** The effects of purchases made as a result of the intervention and further purchases associated with linked firms along the supply chain.
- **Induced:** The effects associated with local expenditure as a result of those who derive incomes from the direct and supply linkage impacts of the project over a set period of time.

- **Deadweight:** The outputs that would have occurred without the intervention.
- **Displacement:** The proportion of intervention outputs accounted for by reduced outputs elsewhere in the target area.

- **Leakage:** The proportion of outputs that benefit those outside of the intervention's target area or group.

5.4.1 Visitor Numbers

The table below highlights the additional visitor numbers to Leicester estimated to be attributable to the discovery of Richard III since 2012.

Total additional visitors to Leicester since 2012 attributable to Richard III		
Visitor Type	Total Increase In Visitor Numbers	Visitors Attributable to Richard III
Total Additional Visitors	830,083	622,562
Total Additional Day Visitors	730,237	547,678
Total Additional Staying Visitors	99,846	74,885

5.4.2 Spend per Head

Average spend per head is available through the 2013 Leicester Steam data. This shows that:

Day Visitors – Day visitors are tourists staying outside of Leicester and visiting Leicester for the day.

In 2013, day visitors to Leicester spent a total of £277.9m. There were 8.223m day visitors in 2013 and therefore on average, each visitor spent £33.80.

Overnight Visitors – Overnight visitors are staying visitors spending at least one night in Leicester.

In 2013 staying visitors to Leicester spent a total of £234.2m. There were 1.252m staying visitors in 2013 and therefore on average, each visitor spent £187.

Source: Steam 2013

Note: the overnight figures show spend for the total length of the stay, not spend per night.

The overnight figures are reinforced by the Visit England Great Britain Tourism Survey 2013. The results are seen below:

Domestic Tourism By Region			
	2012 Trips	2012 Spend (M) (£)	Average Spend per Trip (£)
West Midlands	8.5	1234	145.18
East of England	9.88	1674	169.43
East Midlands	8.5	1339	157.53
London	12.15	2784	229.14
North West	14.19	2664	187.74
North East	4.31	777	180.28
South East	17.92	2929	163.45
South West	19.74	4181	211.80
Yorkshire and The Humber	11.25	1807	160.62
Scotland	12.75	2891	226.75
Wales	9.6	1588	165.42

Source: Visit England Great Britain Tourism Survey 2013.

The survey showed the average length of stay was 3.1 nights with an average visitor spend of £190 per trip.

5.4.3 Calculating the Consequential Factors

a. Multiplier Effect

This section presents the wider economic contributions in terms of the multiplier effects that occur from an additional pound of visitor spending. Multiplier effects can be estimated using the findings from Deloitte and Oxford Economics. Their 2013 report: Tourism: Jobs and Growth – The economic contribution of the tourism economy in the UK, which was prepared for Visit Britain highlights the following information.

Multipliers are a measure of the direct and wider (indirect or indirect and induced) effects relative to the direct effects.

There are 2 key categories of multiplier:

- **Type 1:** which takes into account the direct and indirect effects – i.e. it is the ration of direct plus indirect effects to the direct effects. Type 1 multipliers measure change in output due to the change in final demand. Type 1 multipliers take into consideration all these direct and indirect effects generated due to first round spending.
- **Type 2:** which, in addition to direct and indirect effects, captures the effects of spending by employees (induced effects) – i.e. it is the ration of direct plus indirect plus induced to the direct effects. Type 2 multiplier takes into account, in addition to direct and indirect effects, the extra activities generated within the economy through the expenditure made by employees in a particular sector.

The multiplier effect continues until the money eventually ‘leaks’ from the economy through imports – the purchase of goods from other countries. The report goes on

to quantify the contribution that the tourism economy makes directly (through activities in the sector) and due to spill-over effects (through supply chain and consumer spending that arise from the direct activity in tourism).

The analysis suggests that for a £1 increment there is likely to be an **additional** £1.20 generated in the UK as a result of this activity due to the impact of supply chain effects. This is the Type 1 multiplier.

The analysis suggests that for a £1 increment there is likely to be an **additional** £1.80 generated in the UK as a result of this activity due to the impact of both supply chain and consumer spending effects. This is the Type 2 multiplier. As we are interested in both the indirect and the induced multiplier effect the Type 2 multiplier (£1.80) has been used in this instance.

b. Deadweight: The outputs that would have occurred without the intervention.

No deadweight factor has been applied in this instance as this has already been factored into the visitor figures. Only spend from additional visitors relating to discovery of Richard III has been calculated. We are disregarding those visitors who would have come to Leicester anyway.

c. Leakage: The proportion of outputs that benefit those outside of the intervention's target area or group.

Here the leakage accounts for any spend of these visitors outside of the Leicester area – for example, a day visitor to Leicester may stop at a café or service station before they reach the city boundary. We already know that 37% of visitors to the temporary visitor centre also visited Bosworth Battlefield. To reflect this we have

assumed that 40% of all spend leaks out of Leicester. This represents a leakage factor of 0.4.

d. Displacement: The proportion of intervention outputs accounted for by reduced outputs elsewhere in the target area.

No displacement factor has been applied in this instance as this has already been factored into the visitor figures. Only spend from additional visitors relating to discovery of Richard III has been calculated.

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$$\begin{aligned}
 & \text{Total Visitor Day Visitors} \\
 & \quad \times \\
 & \text{Average Day Visitor Spend per Head} \\
 & \quad + \\
 & \text{Additional Spend from Multiplier Effect} \\
 & \quad \times \\
 & \text{Leakage} \\
 & \quad + \\
 & \text{Total Visitor Overnight Visitors} \\
 & \quad \times \\
 & \text{Average Overnight Visitor Spend per Head} \\
 & \quad + \\
 & \text{Additional Spend from Multiplier Effect} \\
 & \quad \times \\
 & \text{Leakage}
 \end{aligned}$$

The calculations are shown in the table overleaf:

The total impact on the Leicester economy from an increased visitor spend, including the consequential effects, as a result of the discovery of Richard III can therefore be calculated using the following calculation:

5.4.4 Visitor Spend Calculations

Increase in Visitor Spend in Leicester since the Discovery of Richard III, including the Consequential Factors										
Total Visitor Spend	Spend per Head £	Total Visitors	% Visitors Attributable to Richard III	Total Visitors attributable to RIII	Total Spend by visitors £	Type 2 Multiplier	Additional spend resulting from Multiplier £	Leakage Factor – spend leaking out of Leicester	Percentage of spend remaining in the area	(Total spend + additional spend from multiplier) x (1-leakage factor) £
Day Visitors	33.8	730,237	75.00%	547,678	18,511,508	1.8	33,320,714	0.4	60%	31,099,333
Overnight Visitors	187	99,846	75.00%	74,885	14,003,402	1.8	25,206,123	0.4	60%	23,525,715
Total										54,625,048

5.5 Direct and Indirect Employment Created as a result of the Discovery

A key economic impact of the discovery of Richard III will be the job creation potential in the local economy.

There will be 2 key elements to this:

- Direct new jobs created.
- Indirect jobs through additional spend in the economy.

5.5.1 Direct Employment

It is anticipated that circa 18 direct new jobs (some temporary and some permanent) were created as a result of the discovery of Richard III in Leicester – further details of this can be found in the consultation section of the report.

5.5.2 Indirect Jobs

Indirect jobs can be measured using techniques developed by Deloitte and Oxford Economics. Their 2013 report: *Tourism: Jobs and Growth – The economic contribution of the tourism economy in the UK*, which was prepared for Visit Britain states:

The marginal revenue required to create a job in UK tourism is estimated to be around £54,000. This is based on regression analysis which suggests that the elasticity of employment with respect to expenditure in the Hotels and Catering sector is approximately 0.89. This indicated that for a 1 per cent increase in total expenditure in UK tourism, it might be expected that FTE employment will increase by 0.89 per cent.

Source: Deloitte and Oxford Economics, *Tourism: Jobs and Growth* (2013)

This means that for every £54,000 spent in the local economy, one new job is created.

Calculations in previous sections show that the additional spend in the tourism economy as a result of the discovery of Richard III is anticipated to be £54,625,048.

Other Consequential Factors

- **Leakage:** The proportion of outputs that benefit those outside of the intervention's target area or group.

No leakage factor has been applied - Leakage has already been applied in the Visitor Spend Calculations.

- **Displacement:** The proportion of intervention outputs accounted for by reduced outputs elsewhere in the target area.

There will be no displacement effect – all of the jobs have been created as a result of the additional spend in the economy – they will be new jobs.

- **Deadweight:** The outputs that would have occurred without the intervention. There will be no deadweight effect – all of the jobs have been created as a result of the additional spend in the economy.

- **Multiplier:** This section presents the wider economic contributions in terms of the multiplier effects that occur from an additional pound visitor spending.

No multiplier has been included as this has already been factored into the visitor spend figure.

We can therefore calculate the number of jobs available for Leicester City residents, within Leicester City as a result of the discovery of Richard III by calculating:

$$\frac{\text{Increased Spend in the Local Economy (£54,625,048)}}{\text{Marginal Revenue Required to Create a New Job (£54,000)}}$$

This directly equates to the creation of **1,012** new jobs in Leicester resulting from the discovery of Richard III.

5.5.3 GVA Impact

This section measures the impact that Richard III has had on GVA in Leicester. GVA measures the contribution to the economy of each individual producer, industry or sector in the United Kingdom.

For the purposes of this analysis we have used the GVA measure of: turnover per employee multiplied by the number of new jobs created as a result of the discovery.

We already know the total jobs created from earlier calculations, but to complete the calculation we now need to establish the ‘turnover per employee’.

5.5.4 Calculating Turnover by Employee

The Annual Business Survey Updated Data for 2013, published in 2014 identifies figures for ‘turnover per employee, per year’ for many different sectors of the economy. The Annual Business Survey is conducted by the Office of National Statistics.

The Annual Business Survey collects financial information for the UK non-financial business economy; variables covered include turnover, purchases and approximate gross value added.

We have therefore used data from the two most relevant sectors in which it is likely that jobs would have been created and then taken an average value of turnover per employee per year across this range.

This can be seen in the table.

Annual Turnover per Employee, by Sector	
Sector	Turnover per employee, per year, FTE
Retail	117,560
Accommodation and Food Service Activities	38,729
Average	£78,145

Source: Annual Business Survey Data 2013, ONS

Taking an average turnover per employee of £78,145 and multiplying this by the potential jobs created we can estimate the potential additional GVA generated:

$$\begin{array}{r}
 \text{Number of New Jobs Created (1012)} \\
 \times \\
 \text{Average Turnover by Employee (£78,145)} \\
 = \\
 \mathbf{1,012 \times £78,145 = £79,082,740}
 \end{array}$$

5.5.5 Value of Volunteering

From consultation with partners we know that the following volunteers have been involved in the various Richard III related activities – see consultation section for more details.

Cathedral:

- If we assume an average of 2 volunteer hours per volunteer per week since the discovery for volunteers at the Cathedral.
- From discussions at the Cathedral we know that there are circa 50 volunteers now up from 12. This is an additional 38 volunteers.
- It has been 110 weeks since it was announced that the remains found were those of Richard III.

This represents 8,360 volunteering hours.

Temporary Exhibition:

- It is anticipated that there were 1,235.5 hours of volunteering in the exhibition and events around the exhibition.

Visitor Centre:

- If we assume an average of 2 volunteer hours per volunteer per week at the Visitor Centre.
- The Visitor Centre has been open for 34 weeks.
- There are 30 volunteers at the Visitor Centre.

This represents 2,040 volunteering hours.

Total Volunteering Hours

This is a total of 8360 + 1,235.5 + 2040 + volunteering hours = 11635.5 hours

In January 2015 median earnings in pounds for employees working in Leicester were £10.19 per hour.

Source: ONS annual survey of hours and earnings - resident analysis Note: Median earnings in pounds for employees living in the area, excludes overtime.

We can therefore calculate that the cost of paid staff to do this work would be as a minimum:

$$£10.19 \text{ per hour} \times 11635.5 \text{ hours} = £118,566$$

5.6 The Economic Impact of the Temporary Exhibition

This section reviews the impact of the Temporary Exhibition at the Guildhall in terms of visitor spend and jobs created. This impact is included within our previous figures but calculations have been undertaken to demonstrate the specific impact of 2 major factors:

5.6.1 Visitor Spend

From a review of the Steam Data for Leicester in 2013 we know the following visitor spend figures:

Day Visitors – In 2013, day visitors to Leicester spent a total of £277.9m. There were 8.223m day visitors in 2013 and therefore on average, each visitor spent £33.80.

Overnight Visitors - In 2013 staying visitors to Leicester spent a total of £234.2m. There were 1.252m staying visitors in 2013 and therefore on average, each visitor spent £187.

To calculate total visitor spend we now need to understand the visitor profile to the temporary exhibition.

From a visitor survey at the temporary exhibition we know the split of local visitors against county, UK and overseas visitors – 23% City, 77% from the County, UK and International.

We also know from staff that during its opening period visitor numbers to the temporary exhibition were 201,653. This can be seen in the table.

Visitor Numbers to the Temporary Exhibition		
Segment	%	Associated Visitor Numbers
City Centre Resident Visitors	23	46,380
County, UK and International visitors	77	155,273
Total		201,653

When calculating visitor spend we have excluded city centre residents from our calculations. This reflects the fact that many of these very local visitors may not choose to spend additional money in the city as a result of their visit.

We know that 13% of visitors stay overnight Source: Leicestershire 2013 STEAM Report. We can therefore apportion this percentage to the County, UK and International visitors as shown in the table.

Additional Visitor Spend in the Leicester Economy as a result of the Temporary Exhibition					
Type of Visitor	All Total County, Other UK and International Visitors	% Day or Overnight	Total Visitors	Average Spend per Head £	Total Spend £
Day Visitors	155,273	87%	135,087	33.80	4,565,952
Overnight Visitors	155,273	13%	20,185	187.00	3,774,682
Total					8,340,634

From the table we know that the total increase in visitor spend in Leicester as a result of the temporary Richard III visitor centre was £8,340,634.

5.6.2 Employment

The other key economic impact that the temporary visitor centre has is providing employment in the local economy. The key element of this is the indirect jobs that are currently sustained through the spend in the economy. As previously highlighted, for every £54,000 spent in the local economy, one new job is created.

We can therefore calculate that an additional 154 jobs were created in the local economy as a result of the temporary exhibition centre. (£8,340,634/ £54,000 = 154).

5.7 The Economic Impact of the King Richard III Visitor Centre

This section reviews the impact of the Richard III Visitor Centre in terms of visitor spend and jobs created. This impact is included within our previous figures.

5.7.1 Visitor Spend

From a review of the Steam Data for Leicester in 2013 we know the following visitor spend figures:

Day Visitors – In 2013, day visitors to Leicester spent a total of £277.9m. There were 8.223m day visitors in 2013 and therefore on average, each visitor spent £33.80.

Overnight Visitors - In 2013 staying visitors to Leicester spent a total of £234.2m. There were 1.252m staying visitors in 2013 and therefore on average, each visitor spent £187.

To calculate total visitor spend we now need to understand the visitor profile to the temporary exhibition.

From a visitor survey at the temporary exhibition we know the split of local visitors against county, UK and overseas visitors – 23% City, 77% from the County, UK and International. We have assumed the same split for the permanent exhibition.

We also know from staff at the centre that during its opening period visitor numbers to the exhibition to date are circa 40,000. This can be seen in the table.

Visitor Numbers to the Richard III Exhibition		
Segment	%	Associated Visitor Numbers
City Centre Resident Visitors	23	9,200
County, UK and International visitors	77	30,800
Total		40,000

When calculating visitor spend we have excluded city centre residents from our calculations. This reflects the fact that many of these very local visitors may not choose to spend additional money in the city as a result of their visit.

We know that 13% of visitors stay overnight Source: Leicestershire 2013 STEAM Report. We can therefore apportion this percentage to the County, UK and International visitors as shown in the table overleaf.

Additional Visitor Spend in the Leicester Economy as a result of the Richard III Exhibition					
Type of visitor	Total County, Other UK and International Visitors, day and night	% Day or Overnight	Total Visitors	Average Spend per Head £	Total Spend £
Day Visitors	30,800	87%	26,796	33.80	905,705
Overnight Visitors	30,800	13%	4,004	187.00	748,748
Total					1,654,453

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From the table we know that the total increase in visitor spend in Leicester as a result of the permanent Richard III Visitor Centre was £1,654,453.

5.7.2 Employment

The other key economic impact that the Richard III Visitor Centre has is providing employment in the local economy. The key element of this is the indirect jobs that are currently sustained through the spend in the economy. As previously highlighted, for every £54,000 spent in the local economy, one new job is created.

We can therefore calculate that an additional **31 jobs** have been created so far in the local economy as a result of the Richard III Visitor Centre. ($\text{£}1,654,453 / \text{£}54,000 = 31$).

Heritage, Culture, Leisure and Sport Scrutiny Commission

Work Programme 2015-16

Date	Meeting Items	Actions Arising	Progress
Thurs 30 Jul 15	1) Rugby World Cup – Update of key events 2) Overview of the Heritage Culture Leisure and Sport Portfolio 3) Parks and Open Spaces Services – Update	None recorded	
Thurs 24 Sept 15	1) Festival and Events Review – Update 2) Great Central Railway Project – Progress and costs 3) Economic impact of Richard III		
Thurs 29 Oct 15	1) The Story of Parks 2) Football Investment Project		
Wed 2 Dec 15	1) Belgrave Hall – First Year Evaluation		
Thurs 4 Feb 16	1)		
Thurs 31 Mar 16	1)		

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Appendix D

Heritage, Culture, Leisure and Sport Scrutiny Commission

Work Programme 2015-16

FORWARD PLAN / SUGGESTED ITEMS		
Topic	Detail	Proposed Date
Plans for Western Park Golf Club Land	<ul style="list-style-type: none">• What will the area be used for?• Will it retain the open space given the pressures of other developments around that area?	
Economic impact of Richard III	<ul style="list-style-type: none">• What was the impact, how much money went into the local economy and where did it specifically go?	
Football Investment Strategy	<ul style="list-style-type: none">• Are the football pitches coming in need of maintenance following early investment since the start of the strategy?• Was there a revenue budget set aside for this?	
Sports Centres Review	<ul style="list-style-type: none">• Progress of review and proposals	
Saffron Hill Cemetery Extension	<ul style="list-style-type: none">• Progress and Costs	
Tourism	<ul style="list-style-type: none">• Jointly with EDTT scrutiny, specific issues in relation to sports and heritage sites etc.	