

20 Years of Lottery Funding of Heritage in Local Areas: Exeter

A report prepared by BritainThinks for the Heritage Lottery Fund

February 2015



Contents

20 Years of Lottery Funding of Heritage in Local Areas: Exeter	1
1. Executive summary.....	4
Life in Exeter	4
Local Heritage	4
HLF in Exeter	4
2. Introduction and methodology.....	5
Objectives.....	5
Methodology.....	5
Area of study.....	6
Background research.....	7
Quantitative research	7
3. Background research	8
Life in Exeter	8
Investment in local heritage.....	9
4. Local residents of Exeter	13
Views of Exeter	13
Exeter’s heritage	14
Heritage funding over time in Exeter	17
The importance of heritage overall	18
National importance	19
Local importance	19
Personal importance	20
Views on heritage funding	22
Appendix 1: Local residents survey questionnaire	24
Section 1: Views of Exeter as a place to live.....	24
Section 2: Engagement with heritage	25
Section 3: Awareness and visits to HLF funded sites in Exeter	26
Section 4: Local quality of life	27
Demographics	30
Note on definitions:.....	30
Appendix 2: Overview of HLF investment in Exeter	31



1. Executive summary

Life in Exeter

- Residents of Exeter strongly believe that it is a good place to live.

Local Heritage

- Awareness of and engagement with heritage is high in Exeter; most residents are satisfied with the heritage on offer in the area.
- Heritage is seen as important by local residents; for themselves, for Exeter, and for the country as the whole.
- Exeter's heritage is seen to make the local area a better place to live, is a source of pride in the area, and makes it a place that other people are likely to visit. A large majority of residents perceive a positive impact on their quality of life as a result of Exeter's heritage.

HLF in Exeter

- Exeter's heritage is seen as having improved over time (including over the 20 years that HLF has been investing in it).
- Awareness of HLF is high in Exeter and residents are supportive of Lottery investment in the area's heritage.

Residents of Exeter are close to the average for local residents across all twelve locations in terms of awareness of HLF, perceptions of the impact of heritage investment and the importance of local heritage sites and projects. They are also similar in terms of their support of Lottery money being used to invest in heritage.

They differ from the average in the strength of their belief that Exeter is a good place to live and the extent to which this has improved during their residency.

2. Introduction and methodology

Objectives

The Heritage Lottery Fund (HLF) was established in 1994 to sustain the UK's heritage by investing in projects that will have a lasting impact on the communities and areas in which they are located. Since then, it has allocated more than £6 billion to nearly 40,000 projects across the UK.

To celebrate this achievement, and to mark its 20th anniversary, HLF commissioned BritainThinks to conduct research in 12 locations across the UK.

The aim of the research is to understand the cumulative impact of HLF investment.

Methodology

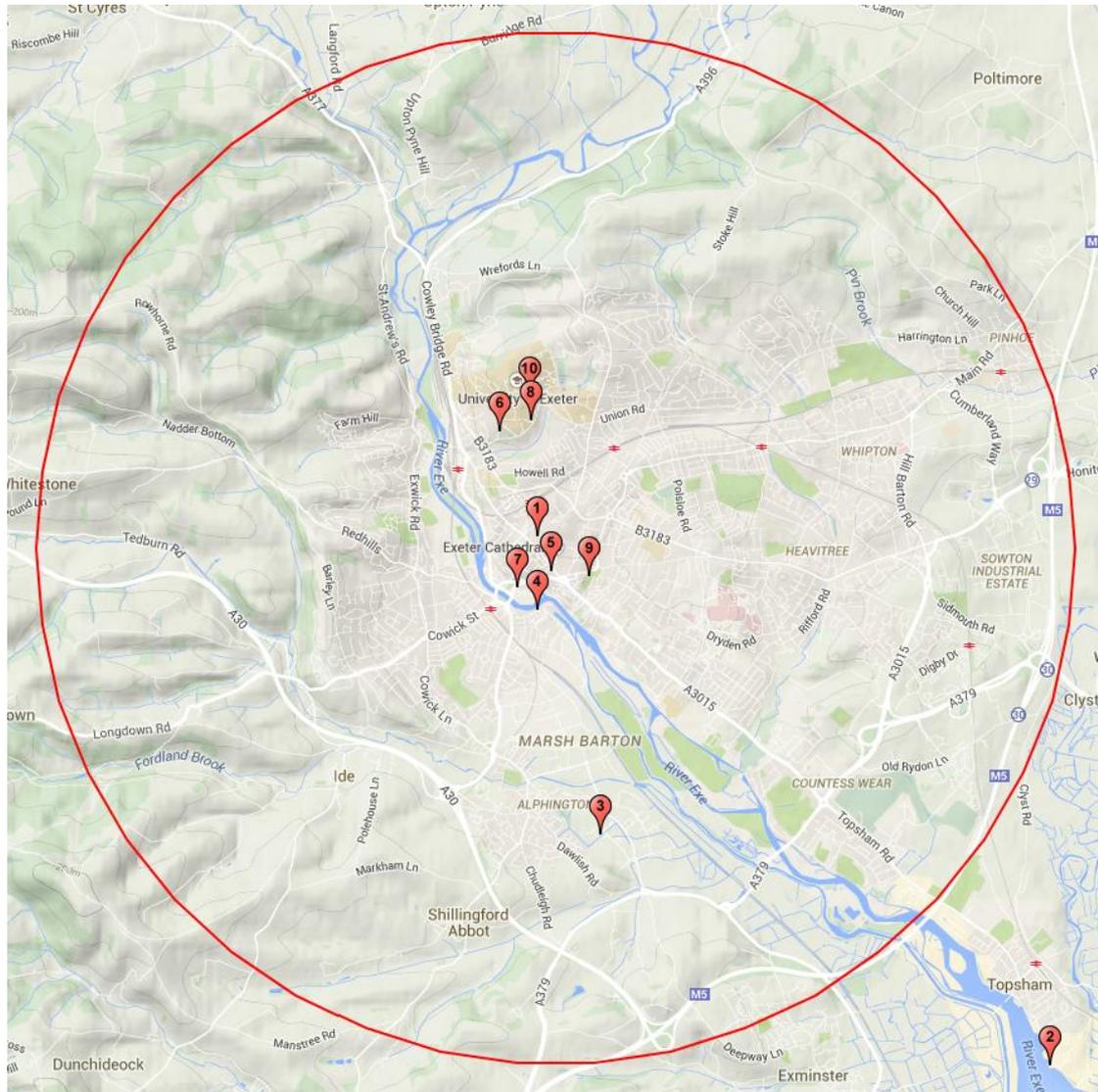
In order to select the locations for this research, all locations where HLF has invested money were banded by population size. Twelve locations were then selected at random, and their suitability for research assessed by HLF before the final list was compiled.

The research consisted of quantitative research and desk research across all 12 locations. In addition, qualitative research, comprising in-depth stakeholder interviews and a workshop with members of the general public was carried out in six of the 12 locations.

Exeter was one of the locations selected for quantitative and desk research. The following section sets out the approach taken.

Area of study

The research was focused on understanding the perceptions of people living in the area shown in the map below, bounded by a 5km radius circle around Portsmouth city centre. The map also shows the location of the HLF funded projects that were featured in the quantitative research, to see what benefits they had for local residents. This featured nine projects within the 5km circle and one - Topsham Museum - that is further out.



Map Data: Google

1	Royal Albert Memorial Museum and Art Gallery
2	Topsham Museum
3	Devon Record Office
4	Cricklepit Mill
5	Reading Rooms at Exeter Cathedral Library
6	Bill Douglas Centre
7	Tuckers Hall
8	John Betjeman's Library
9	Avalon Marshes schools project
10	Xarch - exploring archaeology project

All grant award figures refer to HLF funding within this area and are up to date to the end of September 2013.

Background research

Desk research was carried out in order to contextualise the subsequent stages of the research process. Sources used include: Census 2001 & 2011, ONS, Nomis/ONS, Department of Communities & Local Government Index of Multiple Deprivation (DCLG), and HLF's internal data.

Quantitative research

This stage of the research consisted of a telephone survey with 350 Exeter residents.

The survey was approximately 13 minutes long, and fieldwork was conducted between 25th November and 5th December 2013.

The survey was conducted using a random digit dialling methodology, targeting residents living within a defined set of postcode areas in a five-kilometre radius of the centre of Exeter. The following postcode areas were eligible for participation:

- EX1
- EX2
- EX4

To ensure that the survey was representative of the local area, quotas were set on age and gender. Data were then weighted to the profile of the area by age, gender, employment and social grade.

The findings from this survey are accurate to within +/- 5.24% at the 95% confidence level.

Respondents were asked questions about a range of topics, including:

- Views of Exeter as a place to live (and change over time)
- Awareness of and engagement with local heritage (including 10 pre-selected HLF-funded sites/projects in the area)
- Satisfaction with local heritage offer
- Importance of heritage nationally, locally and personally
- Awareness of HLF and support for Lottery funding of heritage
- Basic demographics, including frequency of Lottery playing

The survey was conducted using a questionnaire designed by BritainThinks in collaboration with HLF. A copy of this questionnaire can be found in the appendix.

3. Background research

- Exeter is a relatively small city in Devon with a fairly young and ethnically homogeneous population.
- It is an economically successful area and has improved, in relative and absolute terms, in recent years.
- Exeter has received considerable HLF investment since its inception, primarily in its museums, galleries and archives.

Life in Exeter¹

Exeter is a relatively small city within the ceremonial county of Devon. Its population has slowly but steadily increased over the past decade

- 117,773 people live in Exeter (Census 2011)
- The population of Exeter was 111,076 in 2001 and has risen by 6% since (Census 2001)
- By comparison, the total UK population rose by around 7.7% in the same period (ONS)

Exeter performs better - on average - than the rest of the country in terms of employment, the proportion of residents claiming Jobseeker's Allowance (JSA), and qualifications. However, the median wage remains lower than the national average

- Unemployment in Exeter rose from 4.6% in 2004 to 5.9% in 2013. This is a considerably smaller increase than was seen in Great Britain as a whole during this period (4.8% to 7.5%) (Nomis/ONS)
- The proportion of adults of working age claiming JSA increased from 1.4% in January 2006 to 1.6% in March 2014. During this period, the proportion of Exeter residents claiming JSA was consistently lower than the national average (Nomis/ONS)
- The proportion of adult residents without any qualifications remained between 8.1% and 8.9% for most years between 2004 and 2011, below the British average (9.3%) (Nomis/ONS)
- The median weekly wage for employees living in Exeter increased from £333.60 in 2002 to £453.10 in 2013
- Wages are below the current national average of £518.10, as well as the South West regional average of £485.10 (Nomis/ONS)

Levels of income- and employment-deprivation in Exeter are generally below average, and have improved since 1999

- In 2009, Exeter was ranked 189th out of 326 local authorities on the Economic Deprivation Index; this was an improvement from 1999 when it was ranked 122nd out of 326 (DCLG)
- Exeter's income deprivation was 10.2% in 2009 - an improvement from its score of 12% in 1999, and below the 2009 England average of 11.9% (DCLG)

¹ Note: When reference is made to 'Exeter', the data will relate to the local authority area of 'Exeter' (which is often the most precise area for which data is available).

- The level of employment deprivation in Exeter also dropped slightly from 9.7% in 1999 to 8.7% in 2009 - lower than the 2009 England average of 10.2% (DCLG)

Exeter's labour market is very focussed on the services industry. It also has a particularly high proportion of workers in the public administration, education and health industries. There are relatively few jobs in construction, manufacturing, and primary services

- In 2009, the proportion of Exeter workers employed by the services industry was 83.6%. By 2012, it had reached 89.4%. The 2012 national average for workers this sector was 85.5% (Nomis/ONS)
- In 2012, the percentage of jobs in public administration, education and health was 36.9% - far higher than the national average of 28.1% (Nomis/ONS)
- 7.5% of people working in Exeter in 2012 were employed in primary services, construction, manufacturing, or energy and water. This was considerably lower than the overall national proportion for these sectors: 14.6% (Nomis/ONS)

The population of Exeter is relatively young and is getting younger

- 62% of the population of Exeter is under 44, compared with 58% of the population of the UK (Census 2011)
- In 1994, 64.7% of Exeter's population was of working age (16-64), somewhat above the figure for Great Britain at the time (63.8%). By 2012, the proportion of Exeter's population that was of working age had increased to 68.2%, whereas Britain's had only slightly increased - to 64.2% (Census 2011, Nomis/ONS)

Exeter's population is less diverse, proportionally, than the rest of the country. Although diversity has increased in the past decade, it has done so much more slowly than in the rest of the country

- In 2011, 88.9% of Exeter's population was born in the United Kingdom (compared with 87% of the UK's as a whole). This indicates a 4% drop since 2001 (Census 2011)
- 93% of Exeter's population described their ethnicity as White in 2011, compared with 85.9% of England and Wales as a whole (Census 2011)
- In 2001, 94.7% of Exeter's population described themselves as White (Census 2001)

Exeter is governed by Exeter City Council, which is Labour-run

- Labour currently holds a majority in the Council, with 24 seats
- The Conservatives hold 11, and the Liberal Democrats have 5
- Prior to 2010, the Liberal Democrats controlled the council

Investment in local heritage

There have been varying levels of HLF investment in Exeter's heritage in the last twenty years

- HLF has awarded grants worth a total of £19.6m to 64 projects since 1995/96, equivalent to £167.56 per local resident².
- The value of grants for projects which had completed at the time of the research was £18.5m, or £158.38 per capita. This is higher than the average of £149.70 per capita that has been invested across the 12 locations included in this study³.

The amount invested has fluctuated considerably across the twenty years

- In 2004/05, over £10m was awarded to Exeter City Council for the Royal Albert Memorial Museum and Art Gallery
- The value of other individual grants awarded has varied, including £123,750 for Sir John Betjeman’s Library, and £6,200 for the Heritage Performance and Film Project

Investment has been made in different areas of heritage

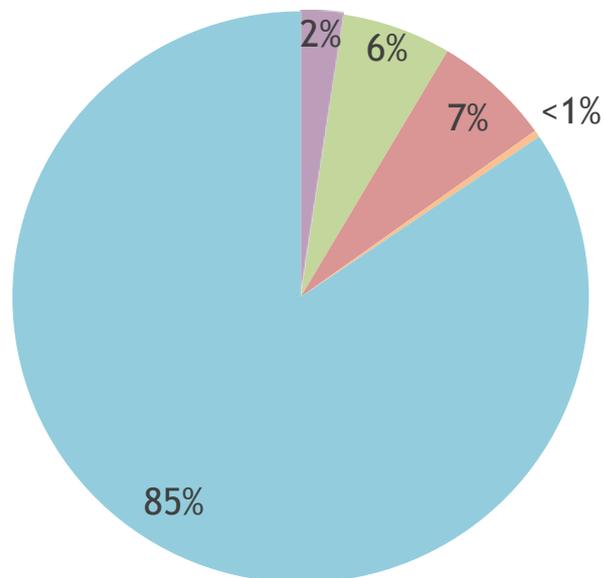
- £16.6m in museums, libraries, archives and collections
- £1.3m in land and biodiversity
- £1.2m in historic buildings and monuments
- £469,738 in intangible heritage
- £79,200 in community heritage

Grants have been made to a range of applicants, with the largest proportion going to local authority organisations.

- £15.3m to local authority organisations
- £3.2m to community/voluntary organisations
- £1m to church organisations or other faith-based groups

Areas of investment

- Intangible heritage
- Historic buildings and monuments
- Land and biodiversity
- Community heritage
- Museums libraries archives and collections



² HLF figure using all projects that HLF has invested in within the postal town of Exeter and the resident population figure within postcode areas corresponding to the 5km-radius area of study

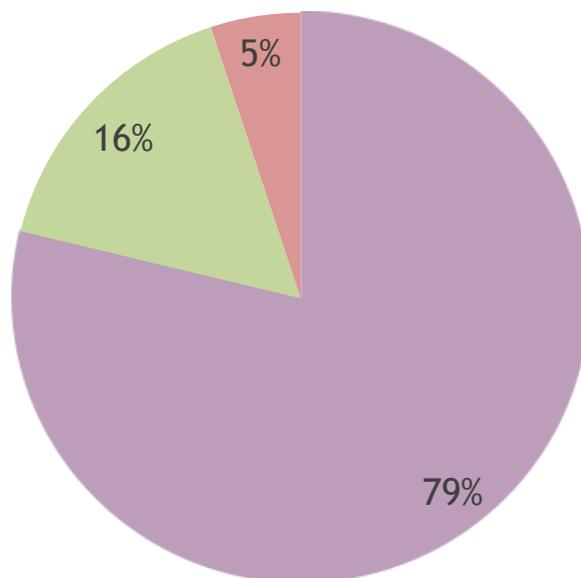
³ Where a reference is made to per capita funding later in this report, this figure for **completed** projects has been used, since only these are likely to have had significant benefit for local residents, to date.

Types of organisation invested in

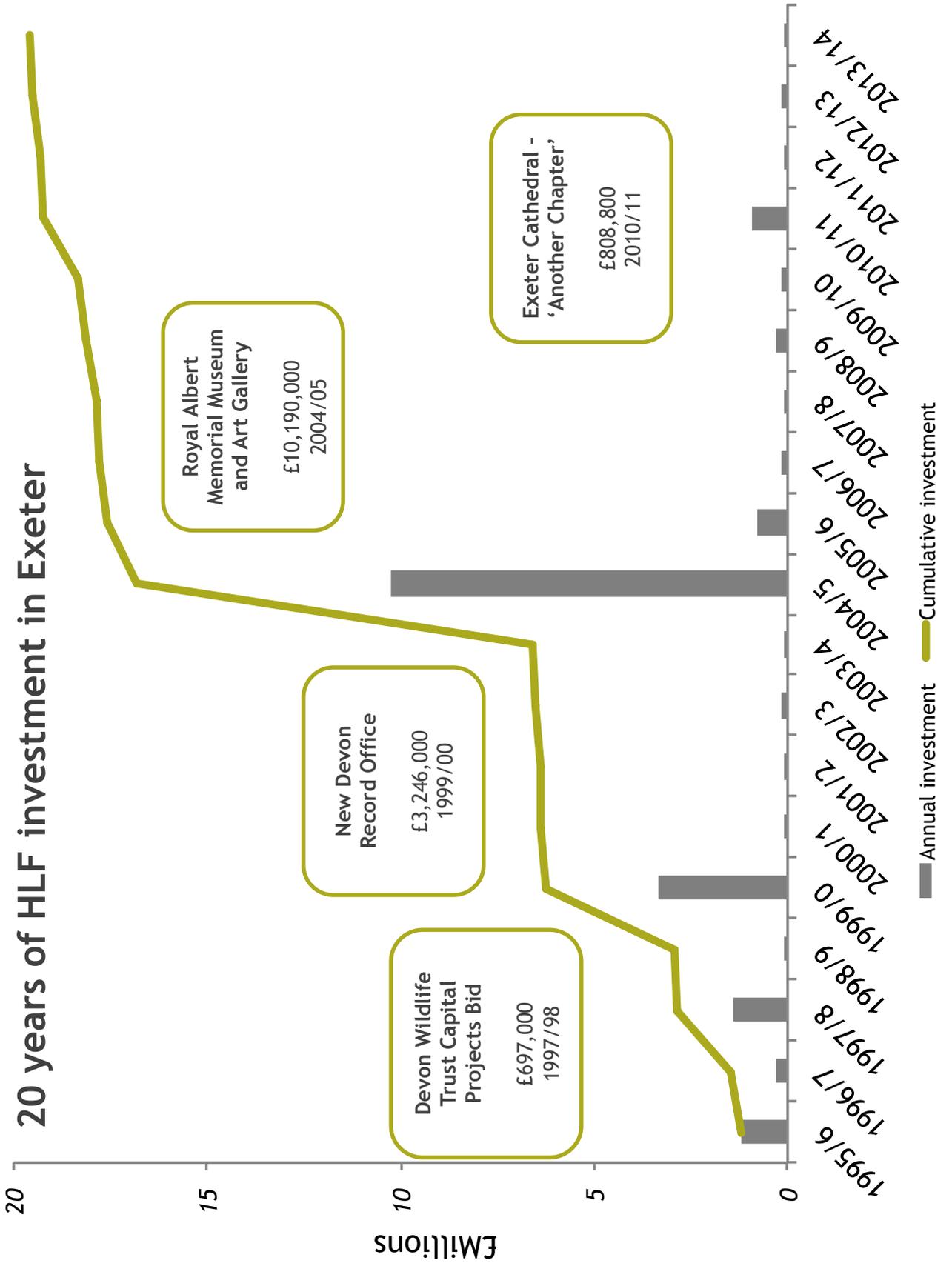
■ Local authority organisations

■ Community/voluntary organisations

■ Church organisations or other faith-based groups



20 years of HLF investment in Exeter



4. Local residents of Exeter

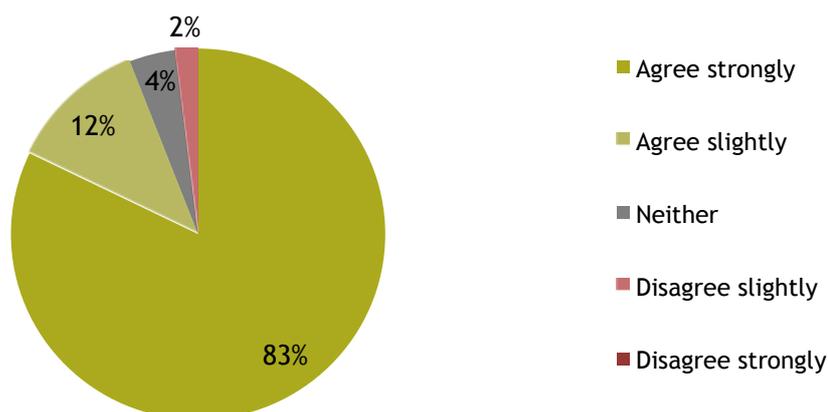
- Residents of Exeter strongly believe that it is a good place to live.
- Locals are more divided on how the area has changed over time. Just over half believe that it has improved; 28% believe it has stayed more or less the same, and 18% believe it has deteriorated.
- Residents display high levels of awareness of and engagement with their local heritage; the majority are satisfied with the heritage on offer in Exeter and the surrounding area.
- Exeter's heritage is seen by local residents to have improved over time, including the 20 years that HLF has been investing in it.
- Local residents see heritage as important: for themselves, for Exeter, and for the country as a whole. Exeter's heritage is seen to make the area a better place to live, is a source of pride in the area, and is thought to make it a place that other people are more likely to visit. Most residents perceive a positive impact on their quality of life as a result of Exeter's heritage.
- Residents believe that HLF's investment in the area's heritage is good use of Lottery money.

Views of Exeter

Local residents strongly believe that Exeter and the surrounding area is a good place to live.

As the chart below shows, 94% of local residents agree that it is a good place to live, with a large majority (83%) strongly agreeing. Only 2% disagree. Across the twelve locations surveyed in this project, 85% of residents agree that their local area is a good place to live, with 56% strongly agreeing. This shows that residents of Exeter have particularly positive views about their area.

% of local residents agreeing that Exeter and surrounding area is a good place to live

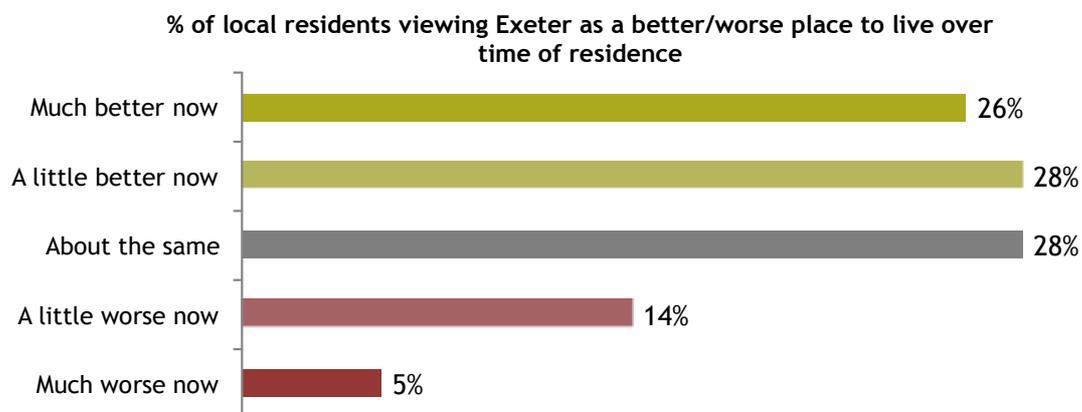


Q2. How much do you agree or disagree that Exeter is a good place to live? [Base: 350 adult residents of Exeter]

Belief that Exeter is a good place to live correlates with the length of time that residents have lived in the local area. For instance, whilst 77% of residents who have lived in Exeter for up to nineteen years strongly agree that it is a good place to live, 91% of people who have lived in the area for 41-60 years strongly agree. Please note that small base sizes mean that these differences are indicative only.

Whilst a large majority of local residents believe that Exeter is a good place to live, there is some difference of opinion about how the area has changed over their

time of residence. Fifty-four per cent of residents believe that the area has improved, 18% think that it is a worse place to live now, and 28% believe that it is unchanged.



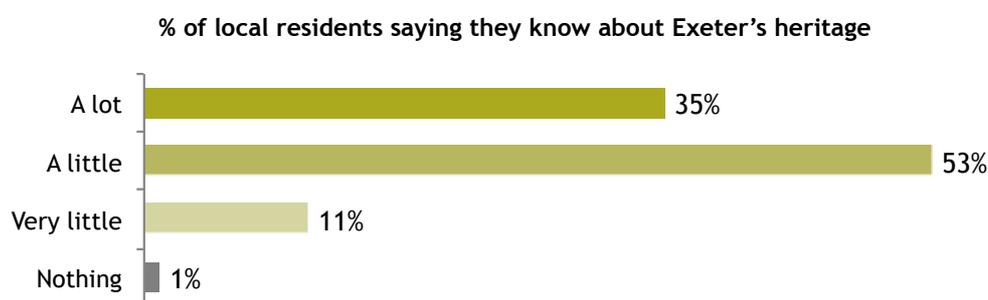
Q3. Over the time that you have lived in the area, has Exeter got better or worse as a place to live? [Base: 350 adult residents of Exeter]

This compares favourably to the average across the twelve locations in which just 42% of the sample say that their local area has improved and 26% believe their local area has become worse over their time of residence. This may perhaps be attributable to the findings in the background research which showed that levels of both employment and income deprivation in Exeter are below the national average and have improved in recent years.

Exeter's heritage

Residents of Exeter say they have high levels of awareness of and engagement with their local heritage.

Thirty-five per cent of local residents believe that they know a lot about Exeter's heritage, 53% say that they know a little and just 1% of the residents surveyed say that they know nothing about local heritage. Levels of knowledge are very similar in Exeter to the average for the twelve areas surveyed (34% know a lot, 50% know a little and 3% know nothing).



Q4. Thinking about Exeter's local heritage, how much would you say you know about it? [Base: 350 adult residents of Exeter]

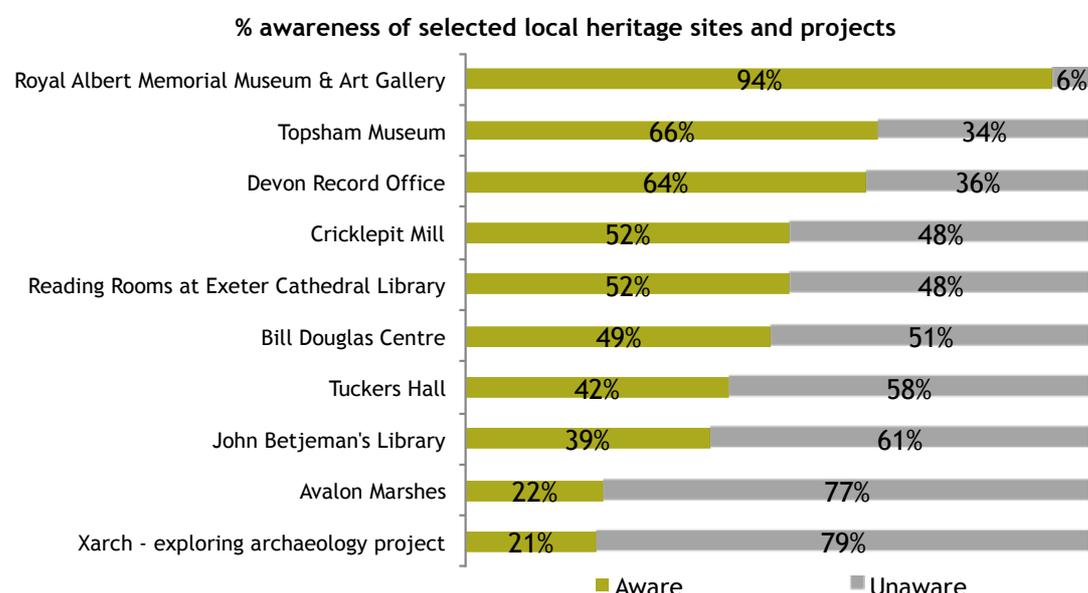
Perhaps unsurprisingly, the number of visits residents have made to heritage sites also strongly correlates with perceived knowledge. Just 21% of residents who have visited one or two selected heritage sites in the area know a lot about Exeter's heritage, compared with 48% of those who have visited three or four sites and 76% who have visited five or more.

There are also variations according to social grade; ABs are more aware of local heritage in Exeter than C1C2s or DEs (95%, 87% and 80% respectively know at least a little).

Awareness of local heritage sites varies considerably between specific sites and projects. Respondents were shown a list of 10 projects, selected to represent a diverse range of projects that HLF has funded in the area. Residents are most likely to be aware of The Royal Albert Memorial Museum and Art Gallery (94% aware).

However, awareness of other heritage sites and projects is considerably lower. Topsham Museum is known by 66% of residents, 64% are aware of Devon Record Office and both Cricklepit Mill and the Reading Rooms at Exeter Cathedral Library are known to 52% of residents.

Residents are least likely to be aware of Avalon Marshes and the Xarch archaeology project, known to 22% and 21% of residents respectively.

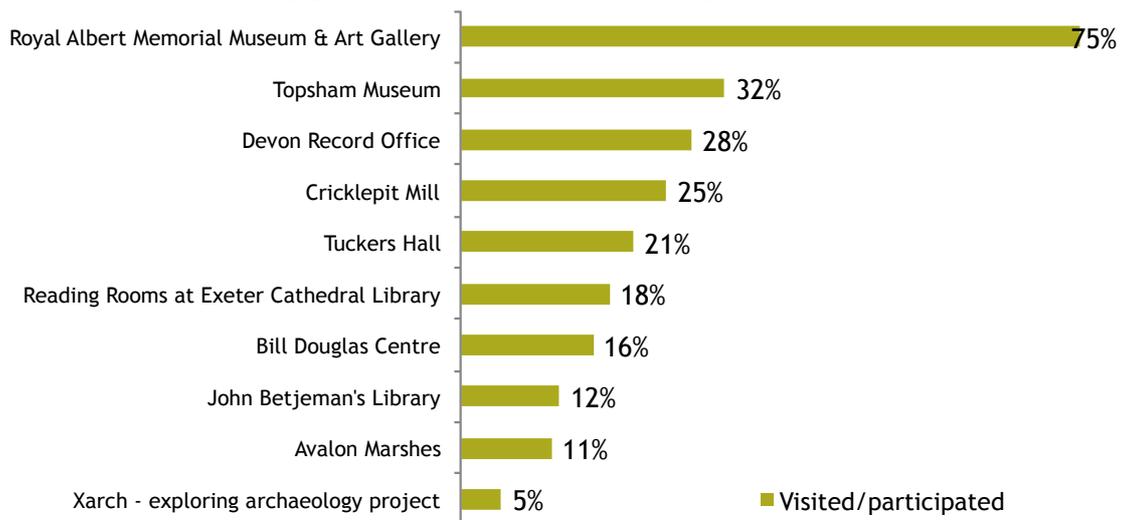


Q8. I am going to read you a list of heritage sites and projects in Exeter. For each one, please tell me if you are aware of it and, if so, whether or not you have visited or taken part. [Base: 350 adult residents of Exeter]

Attendance is mostly in line with awareness; the project most residents have visited and participated in is the Royal Albert Memorial Museum and Art Gallery (75%).

At the other end of the scale, Avalon Marches and the Xarch project both have much lower participation rates, at 11% and 5% of local residents respectively.

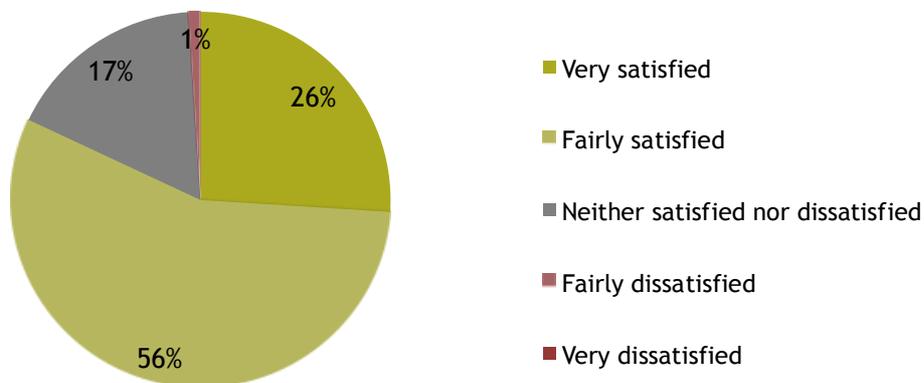
% engagement with selected local heritage sites and projects



Q8. I am going to read you a list of heritage sites and projects in Exeter. For each one, please tell me if you are aware of it and, if so, whether or not you have visited or taken part. [Base: 350 adult residents of Exeter]

Residents of Exeter are generally satisfied with the range of heritage sites and projects on offer in their local area, with 82% describing themselves as very or fairly satisfied. However, satisfaction is quite soft with just 26% saying that they are very satisfied. This suggests that there might be room to increase levels of satisfaction further. Positively, only 2% describe themselves as dissatisfied with the local heritage on offer.

% of local residents satisfied with local heritage sites and projects to visit or be involved with

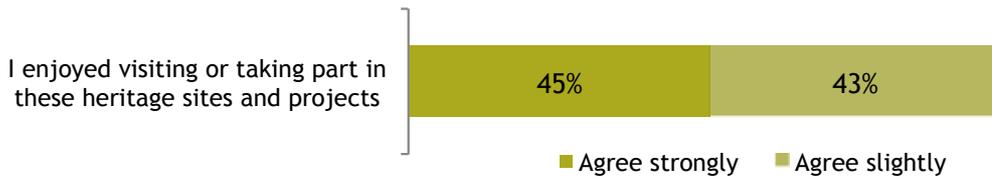


Q7. Thinking generally about what Exeter and the surrounding area has to offer in terms of heritage sites and projects to visit or get involved with, overall, how satisfied or dissatisfied would you say you are? [Base: 350 adult residents of Exeter]

Positively, there is a correlation between awareness of HLF and satisfaction with the local heritage offer; 87% of residents who are aware of HLF are satisfied compared with 74% of residents who are not aware of HLF.

Exeter's residents are very satisfied with their experience at local heritage sites, with 88% of those who have visited or taken part in a local heritage site or project saying that they enjoyed their experience. Just 1% disagree.

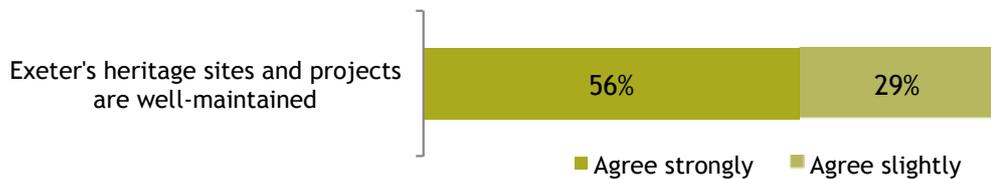
% of local visitors to heritage sites or projects agreeing



Q9. Thinking about your experiences with these heritage sites and projects in Exeter, to what extent do you agree or disagree with the following statements? [Base: 316 adult residents of Exeter who have visited a local heritage site or project]

Further illustrating satisfaction amongst local visitors, 85% believe local heritage sites and projects are well maintained and 91% would recommend that other people visit Exeter to experience the area’s heritage.

% of local visitors to heritage sites or projects agreeing



Q9. Thinking about your experiences with these heritage sites and projects in Exeter, to what extent do you agree or disagree with the following statements? [Base: 316 adult residents of Exeter who have visited a local heritage site or project]

% of local visitors to heritage sites or projects agreeing



Q9. Thinking about your experiences with these heritage sites and projects in Exeter, to what extent do you agree or disagree with the following statements? [Base: 316 adult residents of Exeter who have visited a local heritage site or project]

Heritage funding over time in Exeter

Exeter’s residents largely believe that their local heritage has improved over their time of residence, suggesting that HLF investment in the area has positively impacted on perceptions of the quality of the heritage on offer.

Residents in Exeter are, broadly, split into three camps in relation to perceptions of change in heritage. Thirty-seven per cent believe the local heritage on offer is much better now than at the start of their residency, 28% believe it to be a little better now, whilst 30% believe Exeter’s heritage has stayed the same. Positively, just 2% of residents feel that local heritage has deteriorated.



Q10. Thinking heritage sites and projects in Exeter over the time you've lived in the area, would you say they are... ?
 [Base: 350 adult residents of Exeter]

In addition, 54% of residents who have lived in the area only since HLF's inception have noticed an overall improvement in local heritage. This may indicate that HLF investment has had a beneficial impact on perceptions of local heritage.

As shown in the table below, the proportion of local residents who perceive an improvement in local heritage generally increases with the number of HLF funded sites that they have visited. This suggests that experience of visiting sites and projects increases belief that the quality of local heritage has improved over time.

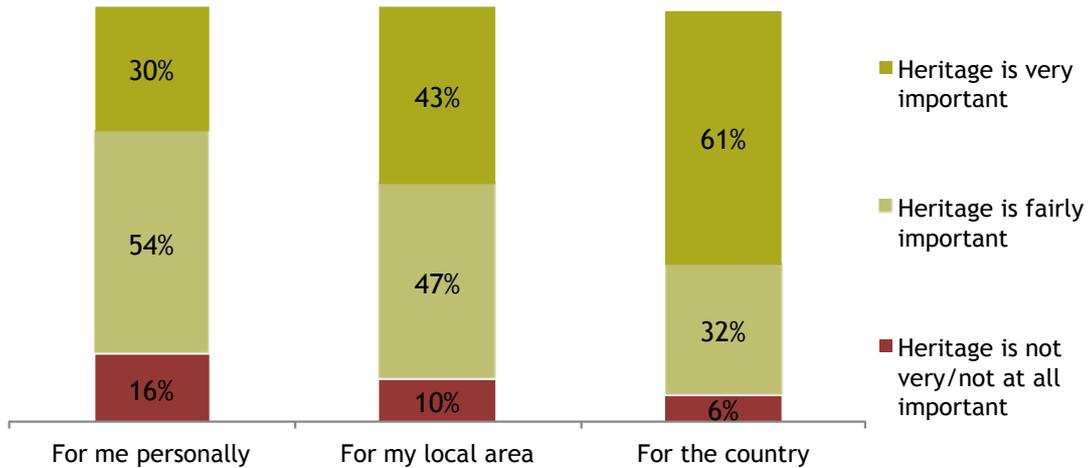
Figure 5: Agreement that Exeter's heritage is better now than at beginning of time of residence

Number of HLF sites visited	Much better now
Visited one or two	36%
Visited three or four	39%
Visited five or more	60%

The importance of heritage overall

Residents of Exeter believe heritage is important for them personally, for their local area, and for the country as a whole.

% of local residents describing importance of heritage to them, their local area and country as a whole



Q6. Overall, how important is heritage for you personally/for your local area/for the country? [Base: 350 adult residents of Exeter]

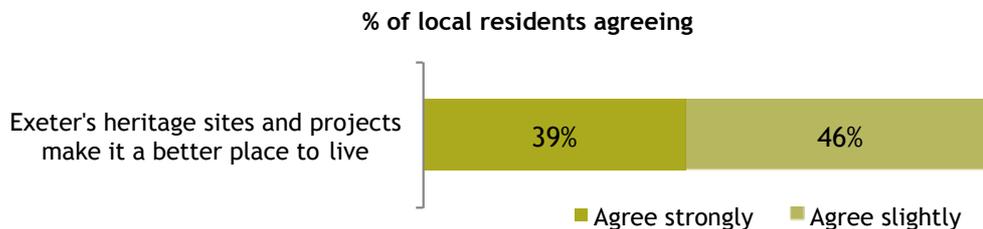
National importance

Local residents are most likely to believe that heritage is important for the country as a whole. As demonstrated above, 93% believe that heritage is important for the country, with 61% believing it to be very important. Residents are twice as likely to believe that heritage is very important for the country than for them personally. This indicates a wider appreciation of its importance, even if residents are less engaged on a personal level.

Local importance

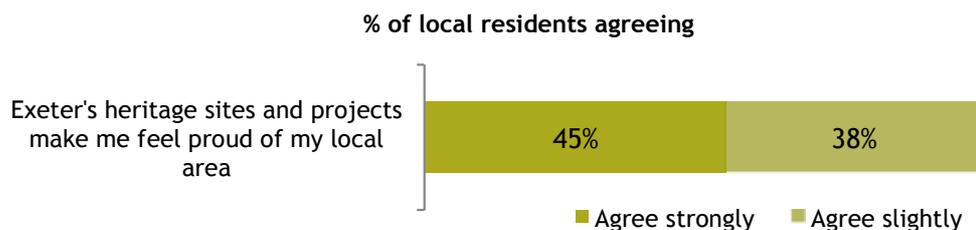
Most residents of Exeter also believe that heritage is important for their local area, with a similar proportion (89%) describing it as important, and 43% describing it as very important.

One of the reasons for this local importance is likely to be the contribution that heritage makes to quality of life in Exeter. Eighty-five per cent of residents believe that Exeter's heritage sites and projects make the area a better place to live.



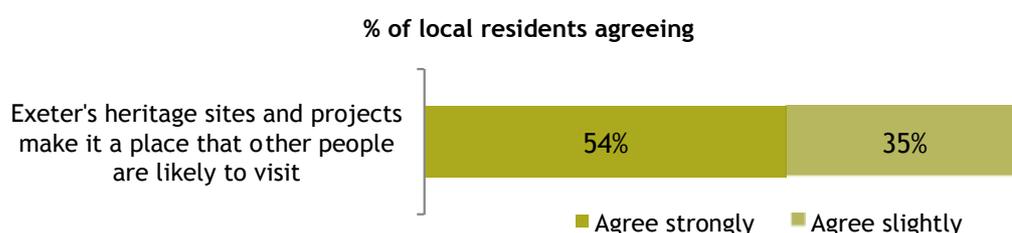
Q11. Thinking about Exeter's local heritage sites and projects, to what extent do you agree or disagree with the following statements? [Base: 350 adult residents of Exeter]

Similarly, residents see Exeter's heritage sites and projects as a source of local pride. Eighty-four per cent of residents state that Exeter's heritage makes them feel proud of the area.



Q11. Thinking about Exeter's local heritage sites and projects, to what extent do you agree or disagree with the following statements? [Base: 350 adult residents of Exeter]

A third reason why heritage is seen as important for the local area by so many residents may be the positive effect it has in attracting tourists to the area. A majority (89%) of residents believe that the area's heritage makes it a place that other people are likely to visit.



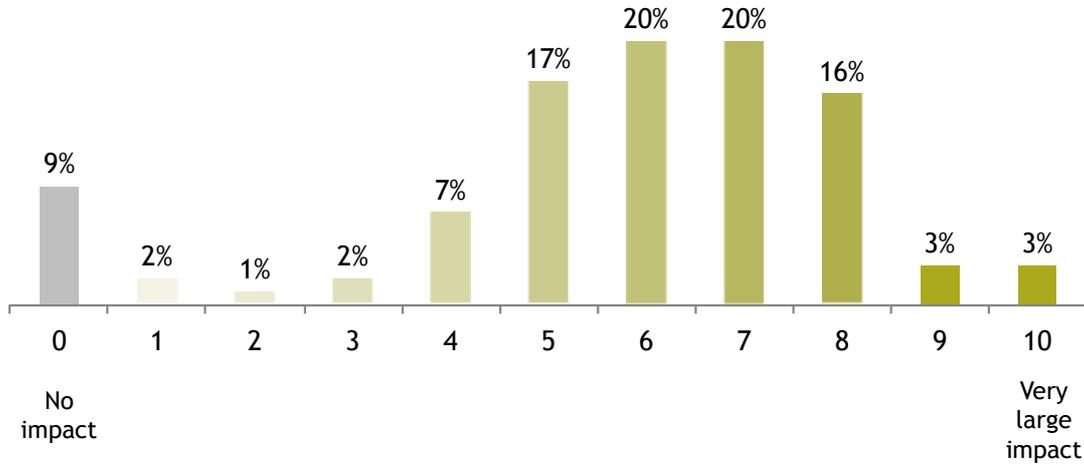
Q11. Thinking about Exeter's local heritage sites and projects, to what extent do you agree or disagree with the following statements? [Base: 350 adult residents of Exeter]

Personal importance

The majority (84%) of residents of Exeter also believe that heritage is important for them personally, with 16% describing it as unimportant.

One possible reason for this is the impact that local residents perceive on their personal quality of life as a result of Exeter's heritage sites and projects. As the chart below demonstrates, 22% of local residents say that Exeter's heritage has a very positive impact on their personal quality of life, (8 or more out of 10), and 64% rate the impact of heritage on their personal quality of life as between 4 and 7 out of 10. Only 9% do not perceive any impact at all.

% of aware local residents perceiving an impact on their quality of life from Exeter's heritage sites/projects

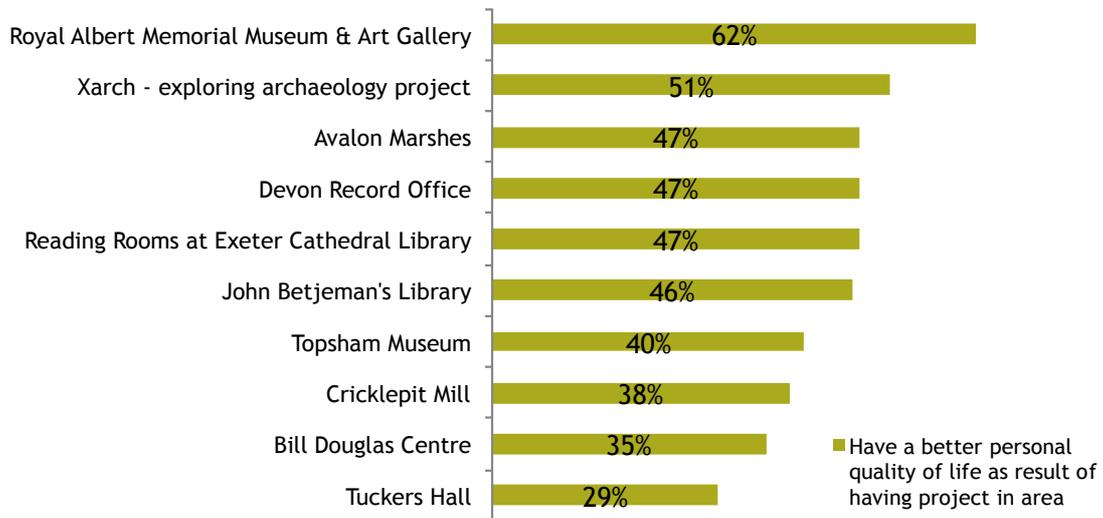


Q13. Thinking about all of the heritage sites and projects that you know about in Exeter together, please rate the impact that they have on your personal quality of life in Exeter. [Base: 336 adult residents of Exeter aware of any local heritage]

Importantly, the impact on residents' quality of life varies substantially between selected local heritage sites. For example, 62% of residents who are aware of the Royal Albert Memorial Museum and Art Gallery believe they have a better quality of life as a result of having the site in the area, whilst just 29% of those who are aware of Tuckers Hall say the same thing.

Interestingly, although the XArch archaeology project has the lowest awareness and engagement of the selected projects, 51% of those who have heard of it say that the project has had a positive impact on their personal quality of life. This project provides free archaeological and historical workshops about local heritage to members of the community, making it a personal and educational project and may explain why it has had such a positive impact on the few residents that have heard of it.

% perceiving personal benefit from selected local heritage sites and projects



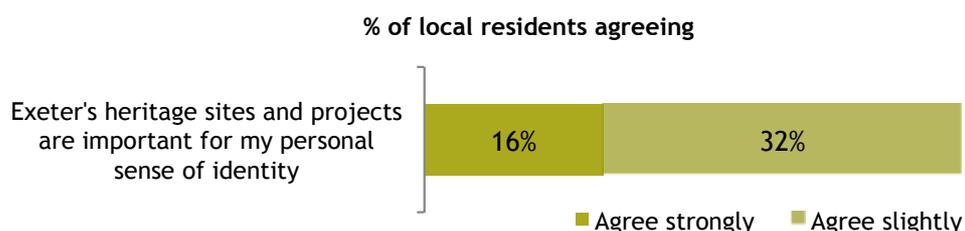
Q12. I'd like you to think now about what you get out of having heritage sites and projects in your area. What effect does having the following in the area have on your personal quality of life? [Base: X adult residents of Exeter aware of each project, selected max. 5 from all aware at random]

Residents may also think of heritage as important to them personally due to the perceived educational benefits that are thought to arise from having heritage projects available in Exeter. Eighty-six per cent of those who have visited sites in the area say that heritage has helped them understand more about the history of Exeter, while 61% feel that they gained a better understanding of other people’s cultures.



Q9. Thinking about your experiences with these heritage sites and projects in Exeter, to what extent do you agree or disagree with the following statements? [Base: 316 adult residents of Exeter who have visited a heritage site or project]

A final potential reason for the personal importance of heritage to Exeter’s residents is the part it plays in their own sense of identity. Just under half (47%) of residents describe Exeter’s heritage as important for their personal sense of identity.



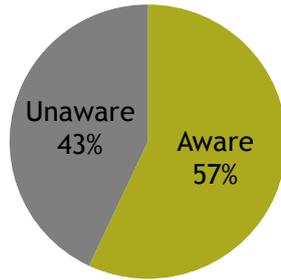
Q11. Thinking about Exeter's local heritage sites and projects, to what extent do you agree or disagree with the following statements? [Base: 350 adult residents of Exeter]

Views on heritage funding

Residents of Exeter demonstrate relatively high levels of awareness of HLF and strong support for Lottery money being used to fund heritage sites and projects in their area.

Just over half (57%) of Exeter’s residents say they have heard of the Heritage Lottery Fund. This is very similar to the average proportion from across the twelve locations in which 56% of participants have heard of HLF.

% of local residents aware of Heritage Lottery Fund

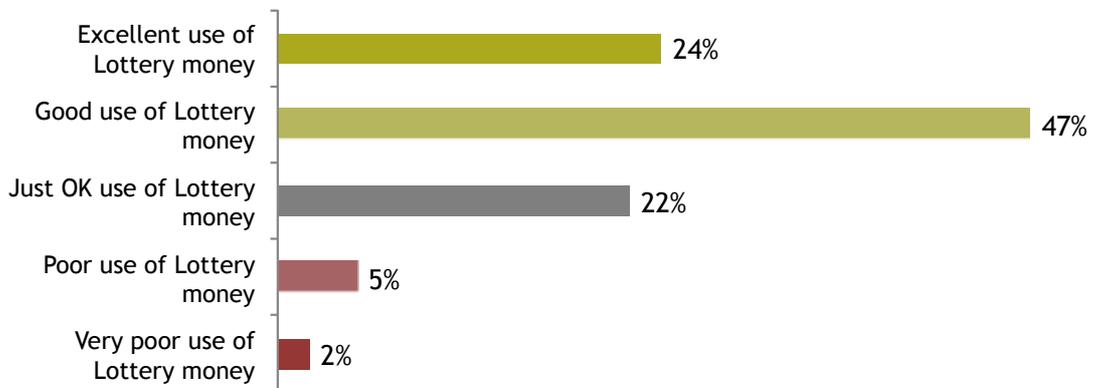


Q14. Have you heard of the Heritage Lottery Fund? [Base: 350 adult residents of Exeter]

There is a strong correlation between age and awareness, with just 35% of 18-34s aware of HLF versus 80% of 45-64s.

Residents of Exeter are very supportive of Lottery money being invested in heritage in the area. Fully 71% of locals describe the £16,483,850 invested in the area by HLF as a good or excellent use of HLF money, whilst only 6% describe it as poor use of Lottery money. Exeter’s residents are similar here to the average found across the twelve locations of this study, in which 69% of participants consider the heritage investments in their area to be excellent or good use of Lottery money.

% of local residents believing investment in Exeter’s heritage to be a good use of Lottery money



Q15. The Heritage Lottery Fund has invested £16,483,850 in the 10 projects we’ve mentioned to you in Exeter. To what extent do you agree or disagree that this has been good use of Lottery money? [Base: 350 adult residents of Exeter]

Appendix 1: Local residents survey questionnaire

Section 1: Views of Exeter as a place to live

ASK ALL. SINGLE CODE ONLY. DO NOT READ OUT.

Q1	<i>How long have you lived in Exeter?</i>	
	0-2 years	(1)
	2-5 years	(2)
	6-10 years	(3)
	11-19 years	(4)
	20-30 years	(5)
	31- 40 years	(6)
	41- 50 years	(7)
	51 - 60 years	(8)
	61 years or more	(9)
	DK	(10)

ASK ALL. SINGLE CODE ONLY

Q2	<i>How much do you agree or disagree that Exeter is a good place to live?</i>	
	Agree strongly	(1)
	Agree slightly	(2)
	Neither	(3)
	Disagree slightly	(4)
	Disagree strongly	(5)
	DK	(6)

[Source: HLF Local Resident Survey]

ASK ALL. SINGLE CODE ONLY

Q3	<i>Over the time that you have lived in the area, has Exeter got better or worse as a place to live?</i>	
	Much better now	(1)
	A little better now	(2)
	About the same	(3)
	A little worse now	(4)

Q3	<i>Over the time that you have lived in the area, has Exeter got better or worse as a place to live?</i>	
	Much worse now	(5)
	DK	(6)

[Source: Adapted from HLF Local Resident Survey]

Section 2: Engagement with heritage

READ OUT: The next questions are about your attitudes towards heritage. By heritage I mean things like museums and galleries, parks, historic buildings and monuments, landscapes and wildlife sites, libraries and archives and also things like local cultures, traditions and story telling.

ASK ALL. SINGLE CODE ONLY.

Q5	<i>Thinking about Exeter's local heritage, how much would you say you know about it?</i>	
	A lot	(1)
	A little	(2)
	Very little	(3)
	Nothing	(4)
	DK	(5)

ASK ALL. SINGLE CODE ONLY.

Q6	<i>Overall, how important is heritage:</i> <i>a) for you personally?</i> <i>b) for your local area?</i> <i>c) for the country?</i>	
	Very important	(1)
	Fairly important	(2)
	Not very important	(3)
	Not at all important	(4)
	DK	(5)

ASK ALL. SINGLE CODE ONLY.

Q7	<i>Thinking generally about what Exeter has to offer in terms of heritage sites and projects to visit or get involved with, overall, how satisfied or dissatisfied would you say you are?</i>	
	Very satisfied	(1)
	Fairly satisfied	(2)

Q7	<i>Thinking generally about what Exeter has to offer in terms of heritage sites and projects to visit or get involved with, overall, how satisfied or dissatisfied would you say you are?</i>	
	Neither satisfied nor dissatisfied	(3)
	Fairly dissatisfied	(4)
	Very dissatisfied	(5)
	DK	(6)

Section 3: Awareness and visits to HLF funded sites in Exeter

ASK ALL. SINGLE CODE ONLY

Q8	<i>I am going to read you a list of heritage sites and projects in Exeter. For each one, please tell me if you are aware of it and, if so, whether or not you have visited or taken part?</i>	
	Yes - I was aware of this and have visited it or taken part	(1)
	Yes - I was aware of this but have not visited it or taken part	(2)
	No - I was not aware of this	(2)
	DK	(3)

ASK ALL WHO CODE 1 AT Q8 (ALL WHO HAVE BEEN TO A HERITAGE SITE OR PROJECT). ROTATE START. SINGLE CODE ONLY

Q9	<i>Thinking about your experiences with these heritage sites and projects in Exeter, to what extent do you agree or disagree with the following statements?</i>	
	<p><i>a) I enjoyed visiting or taking part in these heritage sites and projects</i></p> <p><i>b) Visiting or taking part in these heritage sites and projects has helped me understand more about the history of Exeter</i></p> <p><i>c) Visiting or taking part in these heritage sites and projects has made me have a better understanding of other people's cultures</i></p> <p><i>d) Exeter's heritage sites and projects are well-maintained</i></p> <p><i>e) I would recommend that other people come to Exeter to experience its heritage sites and projects</i></p>	
	Agree strongly	(1)
	Agree slightly	(2)
	Neither	(3)
	Disagree slightly	(4)
	Disagree strongly	(5)

Q9	<i>Thinking about your experiences with these heritage sites and projects in Exeter, to what extent do you agree or disagree with the following statements?</i>	
	<i>a) I enjoyed visiting or taking part in these heritage sites and projects</i>	
	<i>b) Visiting or taking part in these heritage sites and projects has helped me understand more about the history of Exeter</i>	
	<i>c) Visiting or taking part in these heritage sites and projects has made me have a better understanding of other people's cultures</i>	
	<i>d) Exeter's heritage sites and projects are well-maintained</i>	
	<i>e) I would recommend that other people come to Exeter to experience its heritage sites and projects</i>	
	DK	(6)

[SOURCE: Adapted from HLF Visitor's Survey]

ASK ALL. SINGLE CODE ONLY.

Q10	<i>Thinking about heritage sites and projects in Exeter over the time you've lived in the area, would you say they are...?</i>	
	Much better now	(1)
	A little better now	(2)
	About the same	(3)
	A little worse now	(4)
	Much worse now	(5)
	DK	(6)

Section 4: Local quality of life

ASK ALL. SINGLE CODE ONLY. ROTATE STATEMENTS

Q11	<i>Thinking about Exeter's local heritage sites and projects, how far would you say you agree or disagree with the following statements?</i>	
	<i>a) Exeter's heritage sites and projects make me feel proud of my local area</i>	
	<i>b) Exeter's heritage sites and projects are important for my personal sense of identity</i>	
	<i>c) Exeter's heritage sites and projects make it a better place to live</i>	
	<i>d) Exeter's heritage sites and projects make it a place that other people are likely to visit</i>	
	Agree strongly	(1)
	Agree slightly	(2)
	Neither	(3)
	Disagree slightly	(4)
	Disagree strongly	(5)

Q11	<i>Thinking about Exeter's local heritage sites and projects, how far would you say you agree or disagree with the following statements?</i>	
	<i>a) Exeter's heritage sites and projects make me feel proud of my local area</i>	
	<i>b) Exeter's heritage sites and projects are important for my personal sense of identity</i>	
	<i>c) Exeter's heritage sites and projects make it a better place to live</i>	
	<i>d) Exeter's heritage sites and projects make it a place that other people are likely to visit</i>	
	DK	(6)

ASK FOR A MAXIMUM OF 5 HERITAGE PROJECTS OR SITES THAT WAS AWARE OF AT Q8 [ALL WHO CODE 1 OR 2 AT Q8]. ROTATE PROJECTS. SINGLE CODE ONLY

Q12	<i>I'd like you to think now about what you get out of having heritage sites and projects in the local area. What effect does having [insert project name] in the area have on your personal quality of life?</i>	
	Much better	(1)
	A little better	(2)
	Neither	(3)
	A little worse	(4)
	Much worse	(5)
	DK	(6)

ASK ALL WHO ARE AWARE OF A HERITAGE SITE OR PROJECT [ALL WHO CODE 1 OR 2 AT Q8]. SINGLE CODE ONLY

Q13	<i>And thinking about all of the heritage sites and projects that you know about in Exeter together, please rate the impact that they have on your personal quality of life in Exeter. Please answer between 0 and 10, where 0 is no impact at all, and 10 is a very large impact.</i>	
	0	(0)
	1	(1)
	2	(2)
	3	(3)
	4	(4)
	5	(5)
	6	(6)
	7	(7)
	8	(8)

Q13	<i>And thinking about all of the heritage sites and projects that you know about in Exeter together, please rate the impact that they have on your personal quality of life in Exeter. Please answer between 0 and 10, where 0 is no impact at all, and 10 is a very large impact.</i>	
	9	(9)
	10	(10)

ASK ALL. SINGLE CODE ONLY

Q14	<i>Have you heard of the Heritage Lottery Fund?</i>	
	Yes	(1)
	No	(2)
	DK	(3)

[Source: HLF Local Resident Survey]

Q15	<i>The Heritage Lottery Fund has invested £16,483,850 in the 10 projects we have mentioned to you in Exeter. To what extent do you agree or disagree that this has been good use of Lottery money?</i>	
	Excellent use of Lottery money	(1)
	Good use of Lottery money	(2)
	Just OK use of Lottery money	(3)
	Poor use of Lottery money	(4)
	Very poor use of Lottery money	(5)
	Don't know	(6)

ASK ALL. SINGLE CODE ONLY.

Q16	<i>Do you play the National Lottery?</i> [INTERVIEWER TO PROBE FOR FREQUENCY]	
	Yes, I regularly play the National Lottery (once a week or more)	(1)
	Yes, I sometimes play the National Lottery (once a month)	(2)
	Yes, but only rarely (less than once a month)	(3)
	No, I never play the National Lottery	(4)
	DK	(5)
	Refused	(6)

Demographics

- Gender
- Age
- Ethnicity
- Adults in household
- Children in household
- Occupational grouping (ABC1C2DE)
- Postcode

Note on definitions:

‘Disengaged’ residents are those who say they know nothing (4) or don’t know (5) about local heritage at Question 5, believe heritage to be not very (3) or not at all (4) important for themselves personally at Question 6a, and have visited two or fewer heritage sites and project at Question 8.

‘Engaged’ residents are those who say they know a lot (1) about local heritage at Question 5, believe heritage to be very (1) or quite (2) important for themselves personally at Question 6a, and have visited between four and six heritage sites and projects at Qsuestion 8.

‘Super engaged’ residents are those who say they know a lot (1) about local heritage at Question 5, believe heritage to be very (1) or quite (2) important for themselves personally at Question 6a, and have visited seven or more heritage sites and projects at Question 8.

Appendix 2: Overview of HLF investment in Exeter

Applicant	Project Title	Grant Awarded (£)	Heritage Area	Initial Decision
Royal Albert Memorial Museum	Royal Albert Memorial Museum, Exeter	1,175,000	Museums libraries and archives collections	1995-96
University of Exeter	University of Exeter, Bill Douglas Centre for the History of Cinema & Popular Culture	159,000	Museums libraries and archives collections	1996-97
Devon County Council	Dendles Wood, Devon	42,650	Land and biodiversity	1996-97
Devon Wildlife Trust	East Volehouse Farm	36,900	Land and biodiversity	1996-97
Devon Wildlife Trust	Mambury Moor & Kismeldon Meadows	27,400	Land and biodiversity	1996-97
Devon and Exeter Institution	Devon and Exeter Institution - Library and Computer Link	8,000	Museums libraries and archives collections	1996-97
Devon Wildlife Trust	Devon Wildlife Trust Capital Projects Bid	697,500	Land and biodiversity	1997-98
Exeter Historic Buildings Trust	21 the Mint, Exeter	578,079	Historic buildings and monuments	1997-98
University of Exeter	Sir John Betjeman's Library	123,750	Museums libraries and archives collections	1997-98
Exeter City Museum & Art Gallery	Sladen Marine Invertebrate Collection, Exeter - Conservation	68,300	Museums libraries and archives collections	1998-99
Royal Albert Memorial Museum	MOLI - Museum Open Learning Initiatives	72,400	Museums libraries and archives collections	1999-00
Devon County Council	New Devon Record Office	3,246,000	Museums libraries and archives collections	1999-00
Exeter University	Community Landscapes Project	115,000	Land and biodiversity	2000-01

Applicant	Project Title	Grant Awarded (£)	Heritage Area	Initial Decision
Exeter City Council	Ludwell Valley Park Hedgerow Restoration	33,200	Land biodiversity and	2001-02
The Royal Society for the Protection of Birds	Avalon Marshes Schools and Community Project	66,000	Land biodiversity and	2002-03
Royal Albert Memorial Museum and Art Gallery	Love, Labour & Loss	49,800	Museums libraries and archives collections	2002-03
Royal Albert Memorial Museum	Brazil and Amazon Exhibition	19,000	Museums libraries and archives collections	2002-03
Wrights and Sites	An Exeter Misguide	8,338	Intangible heritage	2002-03
Incorporation of Weavers, Fullers and Shearmen	Tuckers Hall Interpretation Project	47,400	Historic buildings and monuments	2003-04
National Youth Theatre of Great Britain	NYT Exeter Heritage Extravaganza	14,300	Museums libraries and archives collections	2003-04
Exeter City Council	Royal Albert Memorial Museum and Art Gallery Development	10,190,000	Museums libraries and archives collections	2004-05
Friends of Devon's Archives	Eighteenth Century Devon: People and Communities	50,000	Museums libraries and archives collections	2004-05
Royal Albert Memorial Museum and Art Gallery	Surf UK	49,600	Museums libraries and archives collections	2004-05
Exeter City Council	Exeter's Home Front	5,300	Museums libraries and archives collections	2004-05
Topsham Museum Society	Topsham Museum Boat Gallery	261,000	Museums libraries and archives collections	2005-06
University of Exeter	XArch Exploring Archaeology	243,500	Land biodiversity and	2005-06
Southernhay United Reformed Church	Southernhay United Reformed Church	81,000	Historic buildings and monuments	2005-06

Applicant	Project Title	Grant Awarded (£)	Heritage Area	Initial Decision
Parish of Central Exeter	St Stephen's Church	62,888	Historic buildings and monuments	2005-06
Exeter City Council	St Nicholas Priory 16th Century Parlour Restoration	50,000	Historic buildings and monuments	2005-06
Devon & Cornwall Police Authority	Driving Heritage	40,900	Museums libraries and archives collections	2005-06
Devon County Council	Drake of Colyton	18,900	Museums libraries and archives collections	2005-06
Tuckers Hall Exeter Ltd	Tuckers Hall Conservation	50,000	Historic buildings and monuments	2006-07
Intercom Trust	LGB/T Community Heritage	49,900	Intangible heritage	2006-07
The Common Players	Apples of the South West	45,200	Intangible heritage	2006-07
RISE SW	Our Devon	22,100	Intangible heritage	2006-07
Devon Wildlife Trust Ltd	Cricklepit Mill Interpretation - The Heart of Exeter's Wild City	49,800	Historic buildings and monuments	2007-08
Exeter City Council	Living Here... West of the Exe. Sense of Place: past, present and future	48,300	Intangible heritage	2007-08
St David's Parochial Church Council	St David's Church Organ Restoration	8,200	Historic buildings and monuments	2007-08
Exeter City Council	Pompeo Batoni - the Devon Connection : Acquisition of the John Rolle Walter Portrait	189,000	Museums libraries and archives collections	2008-09
Community Council of Devon	Devon Community Climate Change Local Histories Project (CCHP)	50,000	Intangible heritage	2008-09
Exeter City Supporters' Trust	Grecian Voices	49,700	Intangible heritage	2008-09

Applicant	Project Title	Grant Awarded (£)	Heritage Area	Initial Decision
Tuckers Hall Exeter Ltd	Tuckers Hall Interpretation Centre	100,000	Historic buildings and monuments	2009-10
The Seahorse Trust	Seahorse Tagging Project	41,100	Land and biodiversity	2009-10
DAISI (Devon Arts in Schools Initiative)	The School Looks Around	33,900	Intangible heritage	2009-10
Exeter Phoenix	Heritage Performance and Film project	6,200	Intangible heritage	2009-10
The Dean and Chapter of The Cathedral Church of St. Peter in Exeter	Exeter Cathedral Another Chapter - Chapter 2	808,800	Museums libraries archives and collections	2010-11
Poltimore House Trust	Poltimore House: access, interpretation, learning and archive	43,000	Historic buildings and monuments	2010-11
Exeter Royal Academy for Deaf Education	Signs of the Times	40,700	Intangible heritage	2010-11
Community Equality Disability Action (CEDA)	A History of Exeter	17,100	Intangible heritage	2010-11
Exeter Phoenix	John Babbacombe Lee project	7,400	Intangible heritage	2010-11
The Parochial Church Council of the Ecclesiastical Parish of Central Exeter	St Stephen's Project, Exeter - Heritage Information Centre	35,900	Historic buildings and monuments	2011-12
Exwick Youth Council	Playground Games 2	19,300	Intangible heritage	2011-12
Double Elephant CIC	Leonard Baskin and Ted Hughes Archive Project	9,900	Intangible heritage	2011-12
Devon Development Education	Telling our stories, finding our roots: Exeter's Multi-coloured History	49,300	Intangible heritage	2012-13

Applicant	Project Title	Grant Awarded (£)	Heritage Area	Initial Decision
PCC of St David with St Michael and All Angels, Exeter	St Michael's Pipe Organ Project - Celebrating 150 years of Music, Education and Heritage	40,100	Historic buildings and monuments	2012-13
St Thomas Parochial Church Council	Church of St Thomas the Apostle	25,000	Historic buildings and monuments	2012-13
Tuckers Hall Exeter Ltd	Potter's Flagon	11,000	Museums libraries archives and collections	2012-13
Exeter City Supporters Trust	Grecian voices	10,000	Community heritage	2012-13
Dreadnought South West Association	100 suffrage objects: an on-line map/museum for the centenary of the Great 1913 Suffrage Pilgrimage	8,700	Museums libraries archives and collections	2012-13
Exeter CAB	Exeter CAB: Past and future	8,500	Community heritage	2012-13
Exeter Phoenix	Our Neighbourhood	7,300	Community heritage	2012-13
Double Elephant CIC	The People of Northernhay Gardens	7,100	Intangible heritage	2012-13
The Elysium Theatre Company	The Wars of the Roses	5,300	Intangible heritage	2012-13
History of Parliament	From the Grassroots: An oral history of community politics in Devon	53,400	Community heritage	2013-14