

Putting the Local into Global Heritage

Balancing conservation, tourism, development, and community interests at the sites of the world's National Trusts





A report of the International National Trusts Organisation

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A note on case studies: Full case studies for each global heritage site are available to download and read via the INTO website. Each case study is linked in the summaries in chapter two.

A note about language: This report uses American English and spelling. However, quotes and names of organizations have been left in their original language where possible.



Foreword



Dame Fiona Reynolds DBE
INTO Chair

I'm delighted to introduce this important report.

It's been commissioned by the International National Trusts Organisation, the umbrella body for the global family of National Trusts and similar organisations, of which I am Chair. Through INTO, we come together to share ideas, resources and experiences. We work to grow the capacity of existing trusts and establish new ones in countries where they do not currently exist. And we act as a global voice on international heritage.

The job of National Trusts all round the world is well captured by INTO's mission statement: to 'promote the conservation and enhancement of the heritage of all nations for the benefit of the people of the world and future generations'. For more than a century, this has focused National Trusts on the challenging tasks of conservation and sharing special places with all those who want to visit and enjoy them.

But it's increasingly clear that we need to do more, if we want to do our job truly sustainably. The people who live in, around, and near extraordinary heritage sites have for too long and too often felt like a forgotten audience, though they often have to bear the down-side of huge numbers of tourists and visitors.

This report, *Putting the local into global heritage*, shows how some of the world's most famous heritage sites have re-thought their relationships with the communities around them, and how their conservation and engagement ambitions have been enriched by that process. Before Covid-19, this process was often triggered by escalating numbers of visitors: now, with almost no tourists, the local community is even more important. Not only are local people our neighbours, at a time of few or no visitors they need even more to become our partners, our collaborators and our friends.

The National Trusts have always been about both people and place, but the way we think about them evolves and matures over time. The pandemic has exposed us to the shock of growing inequalities in our societies, but it has also exposed how much we need the things that money can't buy: the values of community, comradeship and collaboration and the experiences — whether built or natural, tangible or intangible — that heritage provides for us all. We've seen how heritage provides essential services to society, the economy and our environment, and how the world's National Trusts are playing their part in our collective recovery and healing.

We're enormously grateful to American Express for collaborating with us on this important research, and to David Brown of Bearden Brown LLC, the report's author, for his diligent and meticulous research and writing. American Express has long supported INTO's conferences and encouraged our work with communities, and David, a former Executive Vice President and Chief Preservation Officer at the National Trust for Historic Preservation, has been a long-time advocate for the work of our global National Trust movement.

The report will serve as a foundation for an in-depth series of sessions at INTO Online 2021. And we will develop that conversation further as we work towards our INTO Antwerp Conference in May 2022.

Above all, it's a call that reinforces our conviction that what we do matters, so much; and that our work will only be enhanced by enriching our understanding, collaboration and partnership with the people who live on our doorsteps.



Executive summary

Conservation, awareness, and community are essential to the core mission of an extraordinary group of heritage conservation organizations: the world's National Trusts.

The National Trust movement began in the late 19th century in response to fast-disappearing natural and cultural heritage. Beginning with the first Trust more than 125 years ago, the focus has been on places worthy of protection and conservation. Today, the members of the International National Trusts Organisation (INTO) are responsible for some of the most significant natural and man-made cultural touchstones in a diverse and ever-changing world. These are places not only to protect and conserve, but they are also to be shared. The National Trust model of individual members, provided with extensive volunteer opportunities at a network of local sites, is based in community. "For everyone, forever" is more than a slogan; it is the polar star that has guided this work

To be clear, heritage sites and their stewards have too often been slow to fully recognize the importance of local communities. But that is changing. As our understanding of what's worth saving expands and the threats to the world's historic and cultural treasures change, the National Trust movement has responded. The members of INTO are

- increasing their engagement with communities to help uncover forgotten history, and
- working more closely with those who have not always seen their contributions identified and celebrated in the past.

Integration into local communities, an element of the Trust model in structure and theory if not always in practice, now takes on added significance to ensure that resilient and equitable cities, towns, and rural districts are involved as stakeholders in the mission to preserve these irreplaceable reminders of our connectivity as humans.





Project Overview

INTO, with the support of American Express, began this project in 2020 with a focus on how heritage organizations are supporting sustainable tourism models to reduce the environmental impact on heritage sites, enhance the visitor experience at those sites, support local economies, and protect local cultures and traditional values. As we confronted our existing environmental and social challenges in the context of the global impacts of the Covid-19 pandemic, INTO and American Express refined the project scope to examine the way heritage organizations help sustain resilient and equitable communities by balancing conservation, tourism, development, and local interests.

We used this unique opportunity to seek out lessons from the efforts of INTO members and others; lessons that highlight proven pathways toward a more equitable understanding of our heritage — delivered with and by local communities — in the new world emerging from the crises of 2020. The study uncovered ways that some of the world's most famous heritage sites have reconsidered their relationships with surrounding communities, and how that reassessment has enhanced the conservation and engagement work of these National Trusts.

While the focus on tourism models led us to examine sites that welcome large numbers of visitors, we recognize that many INTO members are engaging local communities in a variety of ways, through programs such as the successful Main Street model in the United States. Likewise, the lessons learned extend beyond sites where tourism is a key driver. As our analysis clearly illustrates, there are multiple ways heritage conservation groups large and small, both within and outside the National Trust family, can strengthen their mission and work through local engagement that is focused on sustaining resilient and equitable communities.

Key Lessons

The reconsideration and strengthening of relationships begins with deep, authentic, and lasting engagement with the local community. It relies on crafting an inspiring vision of commitment and sensitivity to those communities. It is open to the possibilities of unexpected resolutions. It understands the broader societal context that provides new opportunities. It leverages multiple platforms to help protect these irreplaceable treasures and sustain local communities.

And in the midst of cascading crises, the world's National Trusts show their own resilience, responding boldly to the needs of the present.

Representatives from INTO and the consulting firm of Bearden Brown LLC collaborated with stewards of five of the world's most famous sites for a deeper analysis. They were chosen in order to consider a cross-section of issues in a variety of contexts and capacities. Each case study revealed multiple learnings, but six key lessons for putting local communities at the heart of our global heritage efforts rose to the top. Each lesson is linked to a particular site, but these key learnings surfaced again and again across all of the case studies.



1 Deep, authentic, and lasting engagement with the local community is crucial to building long-term trust.

The Giant's Causeway

The Giant's Causeway in Northern Ireland is an area of some 40,000 interlocking basalt columns flanked by the North Atlantic Ocean and a landscape of dramatic cliffs. As owner of one of the most heavily visited sites in Northern Ireland, the National Trust of England, Wales, and Northern Ireland (National Trust) has faced a variety of challenges to ensure sustainable, responsible tourism that works for the residents of the local community. The National Trust implemented an extensive community outreach program at the Giant's Causeway — one shaped with the particular history of Northern Ireland, the Republic of Ireland, and the United Kingdom in mind — to bring the relevant stakeholders together, build the local community's trust, safeguard the site, and shape a sustainable future for all.



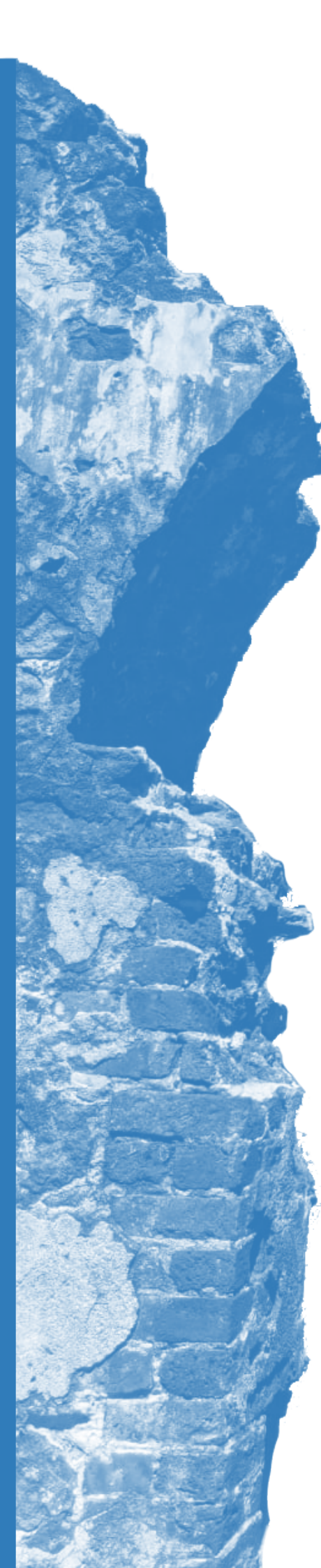
2

Ensure that your core mission prioritizes local communities.

Mehrangarh Fort

Mehrangarh Fort has long played a central role in the lives of the residents of Jodhpur in northern India. It is the fulcrum of identity and pride as well as the locus of economic and administrative activity in a city where the citizens have a multi-layered sense of cultural identity. The Mehrangarh Museum Trust (MMT), having long worked to reflect this uniqueness within the Fort, realized a number of years ago that among the major challenges as they adapted to the future was the changing nature of the relationship of the Fort with the citizens of Jodhpur. They responded with a vision for increasing the Fort's engagement with that population, creating innovative means of addressing their needs and concerns, and making the entire Fort experience more relevant to local visitors and residents.





3

Expect and embrace the unexpected outcomes arising from local engagement.

Pigeon Island National Landmark

Pigeon Island National Landmark is an islet on the northwest coast of Saint Lucia. A nature reserve with ruins of colonial military buildings, the site is leased and operated by the Saint Lucia National Trust (SLNT). The Saint Lucian fishing community has traditionally worked in the immediate vicinity, creating conflicts with paying visitors. The greatest conflict occurred when the fishers would leave their nets on the beach overnight, precluding visitor use the next day. SLNT, beginning with the common goal of supporting the livelihood of the local fishing community, negotiated a solution. Now, watching the fishers has become an attraction of interest for visitors, with some even helping the fishers bring their nets ashore, a testament to the evolving interests of tourists favoring more local, cultural, and “real” experiences.


4

Explore new and creative methods and partnerships to channel short-term transactions into lasting social benefits for the local community.

La Pedrera

La Pedrera in Barcelona, Spain, is a 1912 residential building designed by the renowned architect Antoni Gaudí and owned since 2013 by La Fundació Catalunya La Pedrera. In Barcelona, tourism is more than an economic sector: it is an “inherent and constituent part of the current urban phenomenon.” Such an interrelationship demands a nuanced and unwavering examination of a site’s contribution to addressing the city’s challenges. The organization’s mission is to build “a better and fairer future,” so rather than focusing solely on La Pedrera their wider programs leverage a portfolio of natural heritage sites. Funded with tourism revenue and benefitting more than half-a-million residents each year, the social work includes educational mentoring, resources for elders, science education, cultural exhibitions, and performances.





5

Leverage your platform with government and industry to provide a voice for those local residents who are less powerful and among the least appreciated community stakeholders.

Petra

Petra is a city in southwest Jordan with monumental façades sculpted and built out of solid rock. Managed by a regional authority with support from the Petra National Trust (PNT), the site welcomed 1 million visitors for the first time in 2019. All entities involved recognize the fragile nature of the resource and the negative impacts that result from overcrowding. Government policies that promote large-scale visitation are one reason for the large number of tourists. PNT plays an important role in leveraging its national platform to advocate for changes in policies that may be resisted by powerful stakeholders. They also work with the local community to help broaden the understanding of the value of diversifying income and businesses away from a tourism-only model.

6

Never let a serious crisis go to waste: use challenges to explore fresh approaches to longstanding problems.

A July 2020 survey found that the worldwide Covid-19 pandemic and attendant fallout is straining the financial and programmatic sustainability of many of the stewards of our shared global heritage. Those impacts are coming as they struggle to support their communities and manage tourism at their sites. But many of these organizations have responded in the spirit of never letting a serious crisis go to waste. INTO members are taking fresh approaches to address longstanding problems given the opportunity presented by the crises of 2020. Unsurprisingly, the pandemic caused a reset at all five sites included in our case studies. Strategic plans developed with the expectation of increased tourism based on pre-2020 now require adjustment and flexibility to reflect the reality of curtailed international travel, the health concerns of the local citizens, and the uncertainties and apprehensions of tourists.

“The places and things the National Trust cares for are needed now more than ever, as the nation needs to recuperate and recover its spirit and wellbeing. Our focus will remain on the benefit we deliver to people, every day.”

Hilary McGrady, Director-General, National Trust

National Trusts have protected monuments in nature — both man-made and those crafted by other hands — through earlier pandemics, world and civil wars, changes in climate, and other threats. They have shared and celebrated stories from our past that have opened new understandings both of our past and of who we are today. Out of the experience stretching over 125 years, National Trusts have found that historic times such as these in which we find ourselves now generate interest in history. Alongside a real desire to protect those places that are part of our individual and collective memories and create our community identity, the pandemic provides another opportunity to focus on what matters.





Introduction

The 85 members of the International National Trusts Organisation (INTO) are responsible for the protection and conservation of some of the most significant natural and man-made cultural touchstones in a diverse and ever-changing world. By opening these sites to the public, National Trusts help us become aware of the essential role these places play in the understanding of history and in connecting us as humans. Yet even the most well-known and beloved heritage sites on the international stage are also integral parts of their local communities, contributing in myriad ways to their health, economy, and sustainability.

Conservation. Awareness. Community. Each is essential to the mission of the world's National Trusts. While they have not received equal priority or prominence among these heritage organizations in the past, that is changing.

The National Trust movement began in the late 19th century in response to fast-disappearing natural and cultural heritage. Motivated to preserve the world's historic and natural beauty, non-governmental membership-based national heritage organizations began forming to protect places of cultural significance. From the beginning, these were places to be shared, with multiple options for visitation and extensive volunteer opportunities. "For everyone, forever" is more than a slogan, it is the polar star that has guided this work for more than 125 years. As Octavia Hill, one of the three founders of the National Trust of England, Wales, and Northern Ireland (National Trust) phrased it in 1883's "Space for the People":

"The house is an individual possession, and should be worked for, but the park or the common which a man shares with his neighbours, which descends as a common inheritance from generation to generation, surely this may be given without pauperising."

"How can it best be given? And what is it precisely which should be given? I think we want four things. Places to sit in, places to play in, places to stroll in, and places to spend a day in."

Having such a strong vision provides both core stability and the flexibility that is essential when new challenges inevitably occur. As our understanding of what's worth saving expands and the threats to the world's historic, natural, and cultural treasures change, the National Trust movement has responded. To be clear, heritage sites and their stewards have often been slow to fully recognize the importance of all segments of local communities. However, integration into local communities, always an element of the Trust model in theory and structure if not continually in practice, now takes on added significance to ensure that resilient and equitable cities, towns, and rural districts are involved as stakeholders in the mission to preserve these irreplaceable reminders of our connectivity as humans.

Dame Fiona Reynolds DBE, Master of Emmanuel College and former Director-General of the National Trust, is INTO's Chair. She underlines the importance of this work:

"Beauty, identity, cultural heritage, nature, landscapes — these are the things that make us human. Our organisations stand for these things that bring joy to millions of people. The more people share these values, the more chance there is that protecting our heritage will become integral to our global society's future." (2016)

Modeled on the original Trust established 126 years ago in the United Kingdom, INTO members are unique in personality but united by common goals. These organizations and their more than 8 million members span the globe from Australia, Bermuda, China, and Fiji all the way through the alphabet to Trinidad and Tobago, the United States, Yangon City, and Zimbabwe. Often working with little or no governmental financial support, they ensure the conservation of everything from World Heritage Sites to places of under-represented and forgotten histories; from natural landscapes known the world over to buildings of significance primarily to their local communities.

In the work to identify, preserve, and protect these sites, National Trusts face the same challenges as all sectors of society: global financial and health crises, climate change, sustainability, social injustice, political upheaval, and inequality. These challenges have come together in this third decade of the 21st century to upset established customs, relationships, and models in both developed and developing countries, upending traditional heritage conservation practices and perspectives while creating new opportunities and collaborations.

Several of these challenges require new ways of engaging the growing circle of stakeholders in the conservation of, and public access to, these sites. Conservation has always been a priority of the mission of National Trusts. Heritage tourism, created in response to the universal expression of human curiosity and developed as a way to nurture awareness of people and their stories, has also long been central to the National Trust movement. But as Princess Shivranjani Rajye, CEO of India's Mehrangarh Museum Trust (MMT), notes, great cultural destinations are made "not just with stones and bricks and beautiful carvings, but by the people and stories that give them life." As the third core tenet of the mission of National Trusts comes into focus — that need to connect and engage with local communities — INTO members are adapting and expanding models of conservation and sustainable tourism, recognizing the important connections between protection of sites increasingly under threat, more complete awareness of our full stories, and deep engagement with all parts of our communities.

The study uncovered ways that some of the world's most famous heritage sites have reconsidered their relationships with surrounding communities, and how that reassessment has enhanced the conservation and engagement work of these National Trusts. The analysis illustrates ways heritage conservation groups large and small, both within and outside the National Trust family, can strengthen their mission and work with a focus on sustaining resilient and equitable communities.

“Some of the world’s most famous heritage sites have re-thought their relationships with the communities around them, and their conservation and engagement ambitions have been enriched by that process. Not only are local people our neighbours, at a time of few or no visitors they need even more to become our partners, our collaborators and our friends.”

Dame Fiona Reynolds DBE, Chair of INTO, from the Foreword

Writing of his work with the National Trust and the communities surrounding the Giant’s Causeway in Northern Ireland, engagement consultant Cillian Murphy articulates the challenge in terms of a shift in focus from creating “sustainable destinations” to a commitment to “the sustainability of the host community and their environment.” That can only be done, he asserts, by putting them right at the center of the planning and development process. Instead of work that happens “to the community” and where development is done “for the community,” Murphy suggests we need to move where those engaged in every aspect of preserving and showcasing these cultural touchstones “are at the very least trying to create a destination ‘with the community’ and where the ultimate goal is the destination and tourism development will be delivered ‘by the community’.”





Project Overview

INTO, with the support of American Express, began work on this project in 2020 with a focus on how heritage organizations are supporting sustainable tourism models to reduce the environmental impact on heritage sites, enhance the visitor experience at those sites, support local economies, and protect local cultures and traditional values. As American Express Foundation President Timothy McClimon has written, “According to the World Bank, international tourist arrivals have increased from 524 million in 1995 to 1.3 billion in 2017.” Before the arrival of Covid-19 and a worldwide pandemic, they were “expected to reach 1.8 billion by 2030.”

But the challenges and opportunities in our sector changed significantly with the cascading crises of the year. Over the course of 2020, INTO and American Express refined the project scope to focus on an examination of the ways heritage organizations help sustain communities by balancing conservation, tourism, development, and local interests.

American Express has focused its philanthropic support on helping to build the economic and management capacity of small businesses and nonprofit organizations that create more resilient and equitable communities. This study is designed to provide insights to nonprofit and NGO stewardship organizations as they expand their engagement with local communities. INTO used the unique set of circumstances from the year to seek out lessons from the efforts of our members and others; lessons that highlight proven pathways toward a more equitable understanding of our heritage — delivered with and by local communities — in the new world emerging from the crises of 2020.

There are a variety of international organizations also engaged in elements of this work including Europa Nostra, The European Union, the Getty Conservation Institute, UNESCO, and the World Monuments Fund. Their important efforts are reflected in this report. In addition, while the initial focus on new tourism models led us to examine sites that welcome large numbers of visitors, we recognize that many INTO members are engaging local communities in ways that extend well beyond heritage tourism efforts, such as the successful Main Street model in the United States. In a similar fashion, the lessons learned from our study extend beyond sites where tourism is a key driver.

As our analysis clearly illustrates, there are multiple ways heritage conservation groups large and small, both within and outside the National Trust family, grow stronger through local engagement that is focused on sustaining resilient and equitable communities. We show how some of the world's most famous and beloved heritage sites have reconsidered their relationships with surrounding communities, and how that reassessment has enhanced the conservation and engagement work of these National Trusts. Each case study revealed multiple learnings, but in the final analysis six key lessons for putting local communities at the heart of our global heritage efforts rose to the top. In the following pages, we examine each of these lessons in detail.





Chapter 1

Putting the local into global heritage

The connections between heritage sites, changing conservation practices, new models of tourism, and sustainable communities have been made by commentators, scholars, and practitioners since the 1990s. HRH Princess Dana Firas, President of the Petra National Trust in Jordan and an INTO Ambassador, explains why cultural heritage remains a critical element in the sustainability of local communities today.

“When we look at cultural heritage it really makes sense to keep it high on the agenda at so many levels. If you’re trying to build an inclusive sense of identity, you go back to your cultural heritage. If you’re trying to build public space in which to debate, talk and bring in different perspectives, that can be done through cultural heritage. If you’re looking for resilience strategies: how communities throughout history have dealt with adversity, how they have adapted, how they have changed, that comes to us through knowledge of our cultural heritage. And it makes sense economically.” (2020)

As Dame Fiona Reynolds says in the foreword to this study, for more than a century National Trusts have been focused “on the challenging tasks of conservation and sharing special places with all those who want to visit and enjoy them.” In the Getty Conservation Institute’s 2019 *Historic Cities: Issues in Urban Conservation*, editors Jeff Cody and Francesco Siravo reference a number of landmark studies as they address these very challenges and the potential of community sustainability in the context of development, tourism, and heritage conservation.

“In order for heritage tourism to fulfill its potential,” Cody and Siravo write, “it must be integrated with forms of long-term, responsible planning, accept change within a framework of continuity — thus avoiding the risk of irreversible transformations — maintain local control over the revenues generated from tourism, and be firmly grounded in local participation.”

Principles and objectives connecting conservation, awareness, and community

UNESCO outlines principles and objectives that, while focused on tourism at World Heritage Sites, can be applied to a broad range of places of cultural importance. Their work is based on “dialogue and stakeholder cooperation where planning for tourism and heritage management is integrated at a destination level.” Dr. Noha Nasser’s 2003 study “Planning for Urban Heritage Places” also outlines a number of principles connected with sustainable tourism and heritage conservation that are, in their own way, focused on sustaining resilient and equitable communities. These principles point toward a practice for sustaining local communities that aligns heritage conservation, awareness, and support for new models of tourism. This work:

- focuses on **cultural appropriateness and authenticity**, especially given the danger of the compromise of conservation and cultural heritage values;
- is rooted **within sustainable development**;
- addresses **different cultural use of urban space**;
- ensures **economic viability at the local/destination level**;
- seeks to ensure **environmental sustainability**;
- fosters increased awareness, capacity and balanced participation of **all stakeholders**; and
- ensures that **tourism delivers benefits for conservation** of the properties, **sustainable development for local communities**, as well as a **quality experience for visitors**.

Sustainable development is key to the work of INTO members. When the member states of the United Nations set out their agenda in 2015 to end poverty, promote peace, share wealth, and protect the planet, they rooted it in seventeen Sustainable Development Goals (SDGs) which provide a powerful aspiration for improving our world, outlining where we need to go and how to get there. Cultural heritage, though, gets scant mention in the SDGs: just a brief reference in Goal 11.4 to “strengthen efforts to protect and safeguard the world’s cultural and natural heritage.” It can contribute much more, which is why INTO shared its member organizations’ experiences in working toward the achievement of the SDGs in 2017’s *Heritage Conservation and the Sustainable Development Goals*.

As seen in that study, National Trusts around the world are embracing sustainable models and practices, whether it be developing products and services for people with lower incomes so that a wider range of the world’s citizens can visit the sites that are a part of their heritage (as we will see in India and Jordan); investing tourism receipts in nature conservation and social programs (as we will explore in Spain); involving more women in the work of conservation (as we will discover in India); or working more intentionally with local community members (as in our case studies in Northern Ireland, India, and Saint Lucia).

“If tourism is to contribute to sustainable development, it must be economically viable, environmentally sensitive, and culturally appropriate”

Dr. Noha Nasser, 2003

National Trusts play a leadership role in connecting people and places

The global family of National Trusts has more than a century of expertise in protection and conservation. By focusing on outcomes that deliver for people, local communities, the environment, and conservation interests, National Trusts have been at the forefront of the response to many of today's challenges.

The movement's involvement in heritage tourism developed over time in response to the universal expression of human curiosity. It is a powerful way to nurture awareness of people and their stories, to connect people to place.

As it has grown, the world of heritage tourism has come to include a multitude of stakeholders whose interests and engagement often overlap and can sometimes be at odds with others in the sector. It is unsurprising, therefore, that multiple issues need to be addressed when supporting resilient and equitable communities in a tourism-focused environment. In our broad outreach we found a variety of challenges, including:

- competing priorities among governmental and business stakeholders, the NGOs focused on heritage conservation, and local communities;
- prioritization by industry of large firms and chains over local businesses and economies;
- threats from overtourism to the materials and fabric of historic sites as well as negative impacts on the natural landscapes and resources;
- business models reliant on heavy tourist traffic as well as extensive special use activities; and
- degraded experiences for tourists that reflects poorly on both the NGO administering the site and the local community.

A 2017 study for the World Travel & Tourism Council by the international consulting firm McKinsey & Company — *Coping with Success: Managing Overcrowding in Tourism Destinations* — notes the complex nature of the issue and states up-front that there is no one-size-fits-all solution to build and sustain resilient and equitable communities. But there are multiple pathways forward to explore.

For this project, we selected five specific sites of national and international prominence, all owned, managed, or supported by National Trusts or other heritage-based trusts, to delve into the questions around the balance of conservation, tourism, development, and community interests. But these five are merely representative of hundreds if not thousands of National Trust sites found all around the globe. INTO members are not only concerned with the world's most famous places. What is unique and special about the National Trust approach is the care provided for a wide range of heritage assets — built and natural, tangible and intangible — many of which have important community values that may not always be immediately understood by the heritage profession.

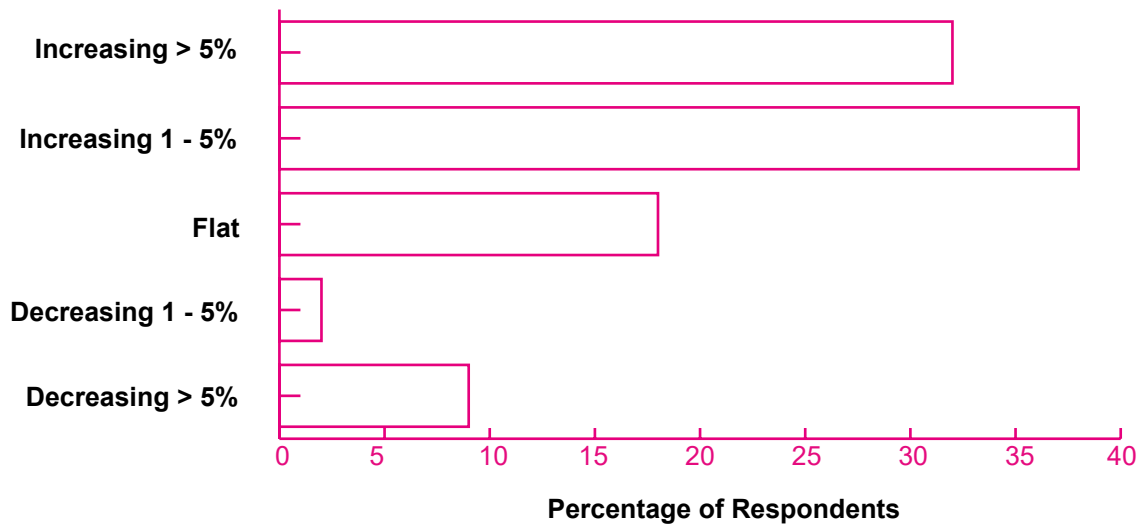
National Trusts care for historic houses, castles, ancient monuments, pubs, gardens, parks, coastline, and nature reserves. They look after places and traditions around the world that matter to local people. Places such as an old gaol and tall ship in Melbourne, Australia; the last remaining sugar mill in Barbados; a bustling Main Street with live music, art galleries, and farm-to-table restaurants thriving alongside legacy businesses in Tupelo, Mississippi; the homes of Joseph Rainey and Mary Prince, key figures in the history of slavery and emancipation in Bermuda; a one-room schoolhouse in the Cayman Islands; beautiful stone cattle corrals in the Falkland Islands; the tomb of a famous Czech writer; the Olivetti shop in Venice; Philip Johnson's Glass House in Connecticut; the last remaining medieval Jewish mikveh in Rothenburg ob der Tauber; beautiful meadows and coastline in Guernsey; the tradition of making black butter in Jersey; pink dolphins in Taiwan; the largest working waterwheel in the world in Laxey, Isle of Man; the Golden Pipeline and pump stations in Western Australia; a rocky escarpment affording stunning views of the surrounding landscape at World's View, Zimbabwe. And so many more.

In ways different from other places that attract tourists and local residents, these sites have the ability, as expressed by INTO Trustee and Chief Preservation Officer for the National Trust for Historic Preservation in the U.S. Katherine Malone-France, "to help define our shared histories; foster truth-telling and reconciliation; and provide spaces where history, nature, and the arts thrive together." In fostering truth-telling and reconciliation, these sites bring forgotten history forward to help tell the full story of our lives together.

Balancing conservation, tourism, development, and local interests happens through National Trusts' efforts to reduce the environmental impact of tourism on heritage sites, engage more broadly and deeply with the local communities around those sites, enhance the visitor experience, support local economies, and protect local cultures and traditional values.

Destinations like Flanders are rethinking how they market themselves based on changes in how they work. Visit Flanders is engaging with INTO member organization Herita to bring to life the aspiration where "the tourism of tomorrow will be rooted in local communities...A flourishing community is very much connected to its specific place; where people work together, where visitors can feel at home and residents can nurture and share their love for the place."

Annual Visitation Trends Pre-Covid-19



These treasures and touchstones that help define our shared histories as humans are clearly an attraction to the world's tourists. The pandemic hit as interest in history, and the places where history happened, is growing. Before the coronavirus outbreak, visitation to heritage sites was on the rise for many INTO members. Two-thirds reported trends of increased visitation in the three years before the pandemic, and slightly more than a quarter reported annual increases of more than 5% during that time.

The places cared for and supported by National Trusts provide multiple opportunities to:

- build awareness and support education around the cultural values of the sites;
- serve as an economic driver and source of employment;
- support work that is culturally appropriate; and
- uncover histories too often ignored or forgotten.

With the coming of the pandemic, interest in natural heritage sites has skyrocketed in many parts of the world, as reported by the members of INTO. The pandemic has underlined how important access to nature is for people, particularly everyday nature on their doorsteps. People have been noticing and appreciating nature's simple pleasures more than ever before: blossom, birdsong, a beautiful view. National Trusts provide important space for both wellbeing and fitness at their sites across the world. As we move forward, many INTO members are thinking about how they can continue to use local reserves and gardens, both to build people's emotional connections with nature and to talk with people about global issues such as climate change.

In ways large and small, the world's National Trusts play a leadership role in connecting people and places.



Chapter 2

Prioritizing community interests

The arrival of the pandemic and the accompanying global financial crisis upset the established customs, relationships, and models of INTO members of every shape and size. As part of this study, five of the world's most famous sites were chosen for a deeper analysis, illustrating the various ways INTO members are bringing the local into global heritage while also showcasing the real-world challenges facing all heritage sites. The efforts of each of these five organizations revealed multiple learnings which can be applied more broadly. Each key lesson is linked to a particular site, but these learnings surfaced again and again and are addressed in more detail in the individual case studies.

The five sites that helped us uncover these lessons were:

- **The Giant's Causeway** in Northern Ireland — A dramatic landscape, owned by the National Trust and known the world over, it provided the opportunity for examination of the deep, authentic, and lasting community engagement that has become a hallmark of the Trust work there in recent years.
- **Mehrangarh Fort** in Jodhpur, Rajasthan in northern India — Standing dramatically on a perpendicular cliff above the city's skyline, it is one of the country's most important monuments. In our study we explore the Mehrangarh Museum Trust's vision for increasing the Fort's engagement with the local population.
- **Pigeon Island National Landmark** in Saint Lucia — Leased and operated since 1983 by the Saint Lucia National Trust, the National Landmark is a nature reserve and site of colonial military ruins. It provided a view into the Trust's work to engage a variety of stakeholders, opening the organization to unexpected outcomes when considering mission-based priorities.
- **La Pedrera** in Barcelona, Spain — A 1912 residential building designed by the renowned architect Antoni Gaudí, it has been owned since 2013 by La Fundació Catalunya La Pedrera. This study gave us the opportunity to consider the greater operational mandate of La Fundació for a range of social programs through the reinvestment of tourism-related revenues.
- **Petra** in southwest Jordan — The city, with monumental façades sculpted and built out of solid rock, is managed by the Petra Development and Tourism Regional Authority with support from the Petra National Trust. Our study allowed us to see how the Trust leverages its national position and platform to highlight the dangers of over-reliance on the tourism economy.

In the end, six key lessons for putting local communities at the heart of global heritage efforts rose to the top.

Lesson 1

Commit to deep community engagement

KEY CHALLENGE:

As the pre-Covid-19 levels of tourism reached and exceeded 1 million visitors annually, the relationships at the Giant's Causeway between the local community, the National Trust, the government, and the larger tourism industry were fraying.

KEY LESSON LEARNED:

Deep, authentic, and lasting engagement with the local community is crucial to building long-term trust.



Click here to review the full case study for the Giant's Causeway

A classic obstacle in prioritizing the interests of the local community is the difficulty in bringing those voices forward amidst the array of powerful stakeholders who press competing and contradictory interests. Unfortunately, it is not until facing a crisis that many stewardship organizations begin to see the benefit of putting local residents at the center of decisionmaking for their communities.

It is in every organization's interest to engage local communities. With the Giant's Causeway in Northern Ireland, an area of some 40,000 interlocking basalt columns flanked by the North Atlantic Ocean and a landscape of dramatic cliffs, the local community helped the National Trust of England, Wales, and Northern Ireland (National Trust) recognize the impact of a recent and significant increase in tourism on their quality of life, the local economy, and the conservation of the site.

As the site's owner, the National Trust prioritized the engagement of the local community in the decisionmaking process on a far deeper level as part of a 2019 study. Cillian Murphy was hired by the Trust to oversee this work, and — given the generations-old conflicts in the region — he included Matt Scrimgeour, a veteran of community engagement and conflict resolution around the sectarian issues in Ireland, on his team. Murphy and Scrimgeour prepared a 15-month process of engagement, with the understanding that ongoing engagement — well beyond the period of the study — will be a key to building trust and ultimately achieving a successful outcome. They insisted on an honest and transparent process, used multiple platforms for the discussion, and drank “lots and lots of cups of tea” at kitchen tables and meeting halls as they met with residents time and time again to gather feedback.

One of the key findings from this work was that historically the National Trust had been seen to facilitate increased public access to sites that communities have not been allowed to visit. However, in the case of the Giant's Causeway the local perception is they (the Trust) are restricting access to a site that we (the community) have had public access to for thousands of years. The perception is that this restriction is almost solely for monetary gain that doesn't benefit the local community.

As Murphy notes, this “makes it almost impossible for the managers to manage the site. Finding a workable solution to this will be key to unlocking the capacity for the Trust to move from volume-based to a value-based metric, one that would deliver far higher benefits for the environment and the local community.”

Lesson 2

Prioritize local communities

KEY CHALLENGE:

Traditionally Mehrangarh Fort had been the fulcrum of local identity and pride, as well as the locus of economic and administrative activity. While maintaining its importance in the local economy as the main attraction for visitors supporting the hospitality sector as well as through direct employment for many local residents, the Fort had become primarily an excursion point and a religious pilgrimage destination.

KEY LESSON LEARNED:

Ensure that your core mission prioritizes local communities.



Click here to review the full case study for Mehrangarh Fort

Supporting broad local engagement builds trust. It also leads toward a more equitable understanding of our heritage — delivered with and by the local community. With a primary focus on the protection and conservation of heritage sites, the role and needs of the local community may be given summary treatment when organizations articulate their core mission. All too frequently the importance of the site in building the community's identity, as well as the contemporary role the community can play in the continued evolution of the site, are absent as organizations craft their mission and develop plans.

Mehrangarh Fort in Jodhpur, Rajasthan in northern India, always played a central role in community life and identity. Several years ago, however, the Trustees of the Mehrangarh Museum Trust (MMT) realized they would face major challenges on many fronts as the Fort and the Trust adapted to the future. MMT has long worked to reflect the community's vibrant identity within the Fort, but the Trust's 2025 Strategy Document found that while local residents comprised the largest numbers of visitors, there was no specific plan in place to serve that population. The important role that the Fort played in the lives of the local population had declined and engagement with the community had decreased. Jodhpur's residents were feeling disconnected. MMT recognized that this was a loss not just to the community but to the Fort as a cultural institution.

In response, MMT now ensures that the local community is prioritized in the core mission. The plan includes a vision for increasing the Fort's engagement with the local population, creating innovative means of addressing their needs and concerns, and making the entire Fort experience more relevant. MMT hopes to play an important role in creating new models for ways in which cultural identity can evolve and remain viable within a contemporary context.

MMT, which is responsible for multiple historic sites beyond Mehrangarh, has devoted significant thought and activity to sustaining the communities surrounding their historic sites while ensuring sustainable survival of the sites themselves. The architectural conservation of the Fort has been aligned with this goal, primarily through training and employing local crafts people in the building arts. The Trust also prioritizes programs which provide significant income to local artisans and craftspersons. In addition to these practical benefits, MMT is strongly committed to keeping the wellsprings of local culture alive, seen most dramatically in the annual performing arts festivals in both Mehrangarh and Nagaur.

Lesson 3

Expect and embrace the unexpected

KEY CHALLENGE:

Differing uses of space between tourists and local communities on the beaches of Saint Lucia led to conflict.

KEY LESSON LEARNED:

Expect and embrace the unexpected outcomes arising from local engagement.



Click here to review the full case study for Pigeon Island National Landmark

As heritage organizations engage with local communities and place the interests of those residents within their core mission, the outcomes of those actions are often new and unexpected. Especially in a time of fast-paced change, we can expect the unexpected to be normal. This hits home in the changing nature of travel, which brings new challenges and opportunities to the stewards of heritage sites.

The Saint Lucia National Trust (SLNT), the longtime manager of Pigeon Island National Landmark, has experienced these changes and unexpected opportunities first-hand. Pigeon Island is the second-most visited site on Saint Lucia, with 80% of the entrances being adult visitors to the island. It was in the contact between those visitors and the local community where SLNT encountered a new challenge.

A nature reserve with ruins of colonial military buildings, Pigeon Island is an islet on the northwest coast of Saint Lucia. When schools of fish enter Rodney Bay, Saint Lucians fish in the immediate vicinity of the beaches on Pigeon Island, creating potential conflicts between paying visitors to the landmark and fishers. The greatest conflict around this contested space occurred when the fishers would leave their nets on the beach overnight, precluding visitor use the following day. As part of its strategy to facilitate collaboration between the local community and those visiting the site from other countries, SLNT met to negotiate with the fishers and the Fisheries Department. They began with the common goal of supporting the livelihood of the local fishing community, putting the interests of the local residents at the forefront of their work. SLNT, the fishers, and the Fisheries Department reached a solution and the conflicts between tourists and the fishing community have largely abated.

Now, watching the fishers has actually become an attraction of interest for tourists, and there have even been instances of tourists helping the fishers bring their nets ashore. This speaks to the evolving interests of tourists favoring more local, cultural, and “real” experiences: here tourists can see something unique and engage with Saint Lucians outside the realms of the carefully curated all-inclusive resort or cruise ship experience.

A potential flashpoint for conflict between resilient and equitable communities in the tourism context is the different cultural use of space. The increasing intrusion by visitors on what the local community sees as private space comes from the growing trend in tourism toward “authentic” and “unscripted” activities. There are other instances in Saint Lucia — such as with the Queen’s Chain, the 186.5 feet of publicly owned land inland of the high-water mark encircling the nation — where SLNT has advocated for the right of continued public access as private multinational corporations have been given leases to use these public assets for private profit.

Lesson 4

Explore new ways to create lasting social benefits

KEY CHALLENGE:

Building a wider foundational mission to redress the physical and social impacts of mass tourism in Barcelona takes commitment, resources, and sensitivity to local issues.

KEY LESSON LEARNED:

Explore new and creative methods and partnerships to channel short-term transactions into lasting social benefits for the local community.



Click here to review the full case study for La Pedrera

Deep engagement, prioritization of the local community, constant mindfulness so as to recognize and build upon unexpected outcomes: each positions heritage organizations to support the sustainability of resilient and ethical communities. But there are instances where organizations see value in going beyond their original mission, extending their core efforts to create deeper and lasting social benefits for their cities, towns, and rural districts. This may be as a result of inherent community needs or it may grow from the realization that an organization's program is creating challenges for local residents.

The mission statement of La Fundació Catalunya La Pedrera calls for the organization to build “a better and fairer future.” As the owners of La Pedrera — a 1912 residential building in Barcelona, Spain, designed by the renowned Catalan architect Antoni Gaudí — the organization opens this landmark to more than 1 million visitors each year in a city where tourism is an “inherent and constituent part of the current urban phenomenon.” Complex interrelationships in a large “tourist city” demand a nuanced and unwavering examination of a heritage site's contribution to addressing tourism's challenges.

Barcelona is aggressively developed and marketed as an international tourist destination. This brings economic growth, but the region exhibits many negative impacts traditionally associated with overtourism. Former working-class neighborhoods have seen displacement as apartments have been adapted into short-term rentals, which can command significantly higher daily rates than monthly renters would pay. Access to affordable food has also worsened, as more grocery stores have been unable to afford the higher rents. These impacts have become significant factors in local politics.

The use of La Pedrera as a celebration of Gaudí's work, a venue for diverse programming, and an architectural attraction per se closely aligns with the ideals the city has set out for ensuring that cultural experiences can remain reflections of Barcelona's unique attraction which enrich the lives of its citizens. Rather than focusing solely on the heritage site, however, La Fundació also conducts extensive social welfare, culture, ecology, education, research, and nutrition initiatives in the region of Catalunya. These wider programs leverage La Fundació's natural heritage sites and the platforms they provide as assets that contribute to an improved and equitable future.

The programs also help mitigate negative social impacts that the greater tourism market in Barcelona has had upon Catalans by reinvesting tourism-related revenue for the public good. As a result, the building becomes more than the ample opportunity it already presents for visitation and education. Now it plays an active role in sustainable tourism efforts in Barcelona.

Lesson 5

Leverage your platform

KEY CHALLENGE:

Over-reliance on the tourism economy in Jordan can threaten the protection of Petra. Current government policies promote an imbalance in favor of tourism over conservation.

KEY LESSON LEARNED:

Leverage your platform with government and industry to provide a voice for those local residents who are less powerful and among the least appreciated community stakeholders.



Click here to review the full case study for Petra

Every organization possesses platforms. Those places and opportunities for public discussion may be physical spaces, political clout, or networks of influence. All heritage organizations use their platforms to speak on behalf of conservation measures, but savvy and effective groups go beyond the obvious. They understand the true reach of their platforms and find ways to leverage that influence to drive change.

The Petra National Trust (PNT) faces challenges that threaten the future of a unique and very fragile World Heritage Site. Petra, a city in southwest Jordan with monumental façades sculpted and built out of solid rock, is managed by a regional authority with support from PNT. The site welcomed 1 million visitors for the first time in 2019 in a city and region where there is a delicate balance to tourism that all parties struggle to manage. The over-reliance on tourism in the economy of the Petra region comes, in part, from government policies that favor international tourists and promote large-scale visitation.

In Wadi Musa, the community surrounding Petra, 80% of the residents depend on tourism for their economic livelihood, while throughout Jordan tourism makes up 15% of the GDP. PNT has worked to promote and coordinate Jordanian and international efforts to preserve the unique combination of antiquities, natural environment, and human traditions in the Petra region, advocating for heritage protection and preservation as a foundation for development, responsible tourism, political identity and participation. In this role, PNT leverages its national platform to advocate for change in harmful government policies that will be resisted by powerful interests. There is also work to be done with the local community to help broaden the understanding of the value of diversifying income and businesses away from a model that relies solely on visitation to Petra.

As sites become over-reliant on tourism, the local communities, government, travel industry, NGOs, and other stakeholders must focus on new ways of managing the imbalance. The local economy cannot be sustained without diversification of income and businesses away from a sole reliance on visitation to places such as Petra. In one sense, residents of the local communities are simply looking for benefits to feed and clothe their families. Conversations around conservation as an ideal do not have the same impact as efforts that demonstrates how local individuals, communities, and economies benefit by developing more sustainable tourism tools. PNT has used the time during Covid-19 to revise their educational programs and sustainability efforts, focusing them on the development of skills to engage with their own communities and supporting conversations with local residents and younger generations built around beliefs and values that support protection and sustainability.

Lesson 6

Use a crisis to explore fresh approaches to long-standing problems

KEY CHALLENGE:

A July 2020 survey conducted by INTO found that the worldwide Covid-19 pandemic and attendant fallout is straining the financial and programmatic sustainability of many of the stewards of our shared global heritage.

KEY LESSON LEARNED:

Never let a serious crisis go to waste: use challenges to explore fresh approaches to longstanding problems.



To review the full case study of how INTO members are responding to Covid-19, turn to page 37

Unsurprisingly, the pandemic caused a reset at all five sites included in our case studies.

Giant's Causeway: A study begun in 2019 to look at the site's capacity as well as the community's ability to welcome and absorb tourist traffic is being completed as part of the site's reset. It will encourage the government of Northern Ireland to move from a tourism model focused solely on the economics of volume-based tourism.

Mehrangarh Fort: The entire Fort was closed for six months, re-opening only in October 2020. To address long-term issues and new areas of focus in response to the pandemic, MMT is offering eco-tourism options at Nagaur Fort, among other places, and the emphasis on farm-to-table food options at its sites will grow as part of the eco-tourism thrust.

Pigeon Island National Landmark: The site reopened to visitors in July 2020, though Saint Lucia has shut itself off from the vast majority of foreign tourists. The Trust anticipates that visitor numbers will take about two years to recover, providing the organization with time to expand educational opportunities.

La Pedrera: To address the crisis and tackle other issues of interest, La Fundació developed a new five-year plan in 2020 which changed their financial model, assuming that international tourists would not return at previous levels. The acknowledgement that business as usual is unlikely provides greater resilience against future social, economic, and environmental conflicts.

Petra: PNT is using this period of low visitation to retool their educational curriculum to reach more people online and continue their long-standing advocacy to lessen the impact of overcrowding. With support from the International Alliance for the Protection of Heritage in Conflict Areas, PNT is building the capacity of local small and medium enterprises to develop and digitize their business, helping communities cope with crises, recuperate, and recover in a fashion that supports sustainability.



National
Trust

One-way
system
in place

Chapter 3

Responding to Covid-19

A July 2020 survey conducted by INTO as part of this project found that the worldwide Covid-19 pandemic and attendant fallout is straining the financial and programmatic sustainability of many of the stewards of our shared global heritage. Those impacts are coming as they struggle to support their communities and manage tourism at their sites. But many have responded with the approach of never letting a serious crisis go to waste. We can take fresh approaches to address longstanding problems when a crisis presents the opportunity. In the face of the crises stemming from the pandemic, National Trusts and other heritage organizations are working on new and creative ways to ensure that these special places are not another casualty of the global health and financial emergencies.

Key lesson learned in the study of heritage organizations during the pandemic:

Never let a serious crisis go to waste: use challenges to explore fresh approaches to longstanding problems.



Giant's Causeway

The engagement with markets from all across the world, including China, led to the National Trust for England, Wales, and Northern Ireland's (National Trust) early attention to the worldwide pandemic. Hand sanitizer and other protective steps were employed the first week in February and the Trust refrained from hiring seasonal workers on their typical schedule. That decision reduced the number of redundancies required for those workers in the first half of 2020.

Nonetheless, the pandemic brought negative economic consequences on staff, with the site having the most redundancies of any property in the National Trust system. However, there have been positive steps that have also come as a result of the forced reset. When they reopened the site in July, the Trust dramatically cut the number of tourists who could visit, limiting it to 935 per day as opposed to the pre-Covid-19 numbers of 4,000-5,000 per day. Plans are in place to increase the numbers allowed on site as the social distancing requirements decrease.

Response: In the National Trust's rethinking of long-term issues during a crisis, a study begun in 2019 to look at the site's capacity, as well as the community's ability to welcome and absorb tourist traffic, is being completed as part of the reset and will be used to encourage the government of Northern Ireland to move from a tourism model focused solely on the economics of volume-based tourism at the expense of a more valuable model based on tourism experience and the local quality of life.



Mehrangarh Fort

Tourism at Mehrangarh Fort dropped precipitously beginning in March 2020. The entire Fort was closed for six months, re-opening only in October 2020. While visitation has slowly increased since then, there have been significant changes. More local and regional guests are visiting, as are domestic tourists from nearby cities, most of whom seem to travel to Jodhpur by road. This is in line with data showing that road trips are gaining in popularity throughout India, as travelers feel they are safer than with air, train or bus travel. International tourists are missing, however (as they are throughout India), and this is not expected to change until air travel normalizes.

The visitors coming to the site in the latter half of 2020 are thus almost exclusively domestic. The attractions the post-Covid-19 visitor is seeking are also changing. Due to the potential spread of the coronavirus in indoor spaces, staff reports that more visitors are looking for eco-tourism opportunities, where they can remain outdoors. Tourists are looking for a safe experience, perhaps even a bubbled experience, that differs from their usual life in the city.

The financial stress caused by the pandemic has been severe. The country-wide lockdown in India in March led to closing the Fort to visitors, leaving only the essential staff on duty. This, of course, cut off all sources of normal income. Mehrangarh Museum Trust (MMT) has strong commitment to its staff and their welfare, however, and has not laid off any staff, even during the six-month period of total lockdown, in spite of zero revenue. Prudent financial planning over the years allowed the building of sufficient reserves to steer the Fort and all who are dependent on it through the Covid-19 crisis. Since the Fort re-opened in October, visitors have begun returning, but MMT will need to rely on its reserves for some time until the changes are fully implemented and something resembling normalcy returns.

Response: MMT is taking several steps that address long-term issues and new areas of focus in response to the pandemic. Visitors are being offered eco-tourism options at other MMT sites, such as Nagaur Fort. The Trust's emphasis on farm-to-table food options at its sites will also grow as part of the eco-tourism thrust that is expected to expand during and after the pandemic.



Pigeon Island National Landmark

Tourism to Saint Lucia and Pigeon Island has fallen to a standstill. The National Landmark reopened to visitors in July 2020, though Saint Lucia has shut itself off from the vast majority of foreign tourists, meaning the few visitors are local residents. The outdoor environment and open space of Pigeon Island have meant that the site has not needed to limit total visitor numbers as significantly as indoor sites or sites with circulation concerns.

Response: The Saint Lucia National Trust (SLNT) developed a Covid-19 management plan stipulating masks and distancing requirements, new cleaning protocols, and employee safety measures. The Trust anticipates that visitor numbers will be significantly lower until a vaccine is widely administered, after which time it is estimated that the numbers will take about two years to recover. This is providing SLNT with time to expand other educational opportunities.



La Pedrera

Covid-19 profoundly impacted the tourism market, bringing visits from local and international tourists alike to a standstill beginning in March 2020. Visitor numbers have fallen by over 85%, and international tourism is not expected to rebound until well after a vaccine is globally available and widely administered. La Fundació lost further revenue through the cancellation of the annual Mobile World Congress, which had rented out the auditorium and exhibition spaces in past years.

In the immediate aftermath of the pandemic and lockdown, La Fundació took on EU and Catalan state funding to maintain the employment and salaries of their staff of 480. The first round of funding allowed them to pay full salaries for three months while later rounds required less subsidization of fewer employees as the financial forecast stabilized. La Fundació also took out a bank loan of €1.5 million to maintain the social programs they operate, with the greatest priority given to those benefitting children and elderly Catalans.

Response: To address the crisis and tackle other issues of interest to the organization, La Fundació Catalunya La Pedrera developed a new five-year plan in 2020 which assumed that international tourists would not return at previous levels. The acknowledgement that business as usual is unlikely provides greater resilience against future social, economic, and environmental conflicts.



Petra

The Petra National Trust (PNT) is used to seeing steep patterns of rise and decline in the number of tourists at the site, as the international component of visitation is heavily influenced by outside events, such as regional conflict. Covid-19 is only the most recent such occurrence. At Petra, international tourists accounted for more than 90% of total visitation in the decade prior to 2020.

An unexpected outcome of the recent upheaval has been a rise in domestic tourism at Petra. Domestic visitation has increased, helped in large measure by a government program that subsidizes more than 50% of travel expenses for individuals visiting domestic sites during the pandemic. There are questions as to how long that trend will continue, absent continued government subsidies.

One significant impact of the onset of Covid-19 is the realization that has come to people in the local communities of the value of Petra to them personally and to their region. Losing Petra, for any reason, would be bad for their lives.

Response: In terms of long-standing issues to be faced, the 1 million visitor milestone was noted with caution by both PNT and site representatives. Negative impacts of the increase in the number of tourists on the cultural site include extensive kiosks, inappropriate events, and poorly sited support facilities. PNT is using this period of low visitation to, among other things, retool their educational curriculum to reach more people online and continue their long-standing advocacy to lessen the impact of overcrowding on the site.

With support from the International Alliance for the Protection of Heritage in Conflict Areas, the Petra National Trust is building the capacity of local small and medium enterprises (SMEs) to develop and digitize their business in line with the new Covid requirements. The project will help businesses cope with crises, recuperate, and recover in a fashion that supports sustaining resilient and equitable communities.



Other INTO members

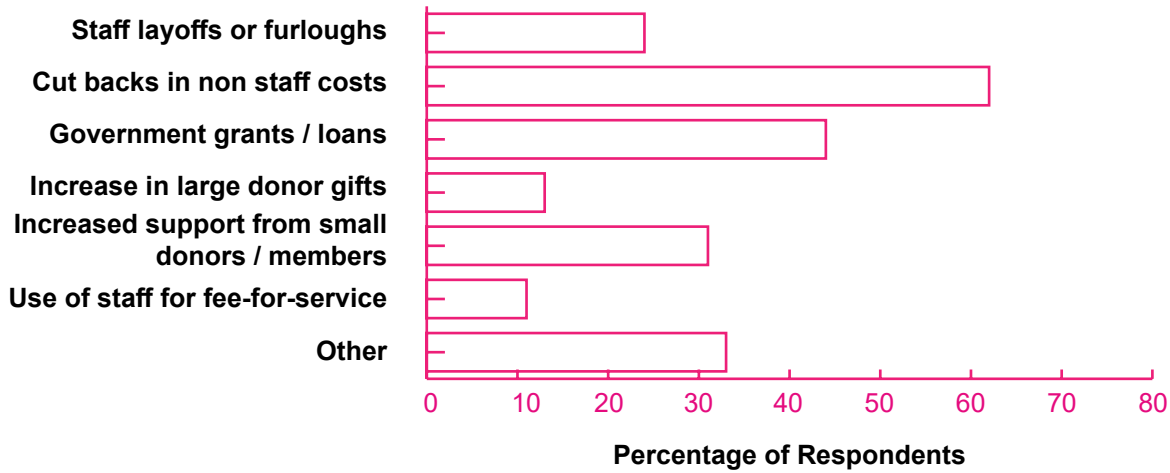
Not all sites have been able to rebound and even those National Trusts which reopened to visitors face further challenges wrought by Covid-19, such as the surge that occurred late in 2020 leading to new shutdowns and restrictions.

The July survey found that many of these organizations have been significantly impacted by the pandemic. More than half have seen a drop in their membership recruitment and retention, an important part of ongoing financial support. And while a third receive less than 10% of their annual budget from site-related income, more than a quarter — or 27% — receive at least half of their income from activities such as admissions, rentals, and gifts shops. With visitation down or non-existent during this period, those groups are seeing serious erosion of their fiscal standing since the arrival of the coronavirus.

Of course, not everyone has experienced the same impacts. As Mohamed Faray Kargbo at the Sierra Leone Monuments and Relics Commission noted, his country had not had the same affects from the pandemic as others around the globe. Yet “the travel restrictions and lockdowns had a serious impact on our heritage sites and museums.” The Monuments and Relics Commission expects that their situation will return to normal over time, but Kargbo adds, “Institutions like ours need to prepare for future pandemics and other global health disasters. We must adapt to the new normal and use online platforms to not only market our sites but also start making income from virtual tours.”

Unfortunately, even the largest National Trusts are not immune from the financial impacts of the pandemic. The National Trust for Scotland took a series of emergency measures in May. These included a significant cut to the workforce, some properties remaining closed until the economy recovers and launching a major fundraising appeal. In late July, the National Trust of England, Wales and Northern Ireland (National Trust) announced job losses for some 1,200 full-time staff, or 13% of the current workforce. Part-time staff saw reductions of 30%. The Trust made these changes as a result of an estimated £200 million (\$272 million USD) loss in revenue in 2020. It has already drastically reduced spending, dipped into unrestricted reserves and accessed government furlough, loan, and grant schemes.

Addressing Loss in Revenue



“We have been careful to ensure that our conservation work is protected with a limit on cuts to jobs that entail caring for houses and collections, gardens, nature and countryside,” noted Justin Albert, National Trust Director for Wales and an INTO Trustee. “We are confident that we have designed the programme in a way that will allow us to continue to deliver our core mission and ensure visitors to National Trust places continue to have the wonderful experiences they have come to expect from us.”

There are several ways National Trusts are working to address this financial strain on annual budgets in the short term. Two-thirds have had to cut non-staff related activities such as programs, marketing, and overhead expenses, 50% have turned to government grants or loans, while a quarter have relied on staff reductions or furloughs.

Catherine Leonard, Secretary-General of INTO, notes, “We’re seeing lots of change across the sector as a result of the pandemic. Some of this is for the better, like faster ways of working and focusing on what is important. But it has also led to a contraction of programmes and staffing. This is, of course, heart-breaking and we are doing what we can to support the INTO family through the crisis.” She adds, “The National Trusts of the world are incredibly resilient, and have, over so many years, responded bravely to the needs of the present. At times like these we really need our National Trusts. And we also, now more than ever, need them working together across the globe, learning from and helping one another.”

Long-term impact

The long-term impact of Covid-19 is unclear for many of these organizations. One survey respondent's comment that a bounce back to pre-pandemic levels of visitation to their sites "depends on commercial air access and quarantine requirements — we may not see any tourists for a long time" reflects the uncertainty faced around the globe in the months ahead.

In a country like the United States, where about 70% of museums and related organizations are history-focused, the sector exerts an enormous economic impact. In an ordinary year, more people go to museums than to major-league sports and theme parks combined. *Time* magazine reported that museums annually "contribute \$50 billion to the U.S. economy, boast more than 726,000 jobs and generate \$12 billion in tax revenue."

"The National Trusts of the world are incredibly resilient, and have, over so many years, responded bravely to the needs of the present."

Catherine Leonard, INTO Secretary-General, 2020

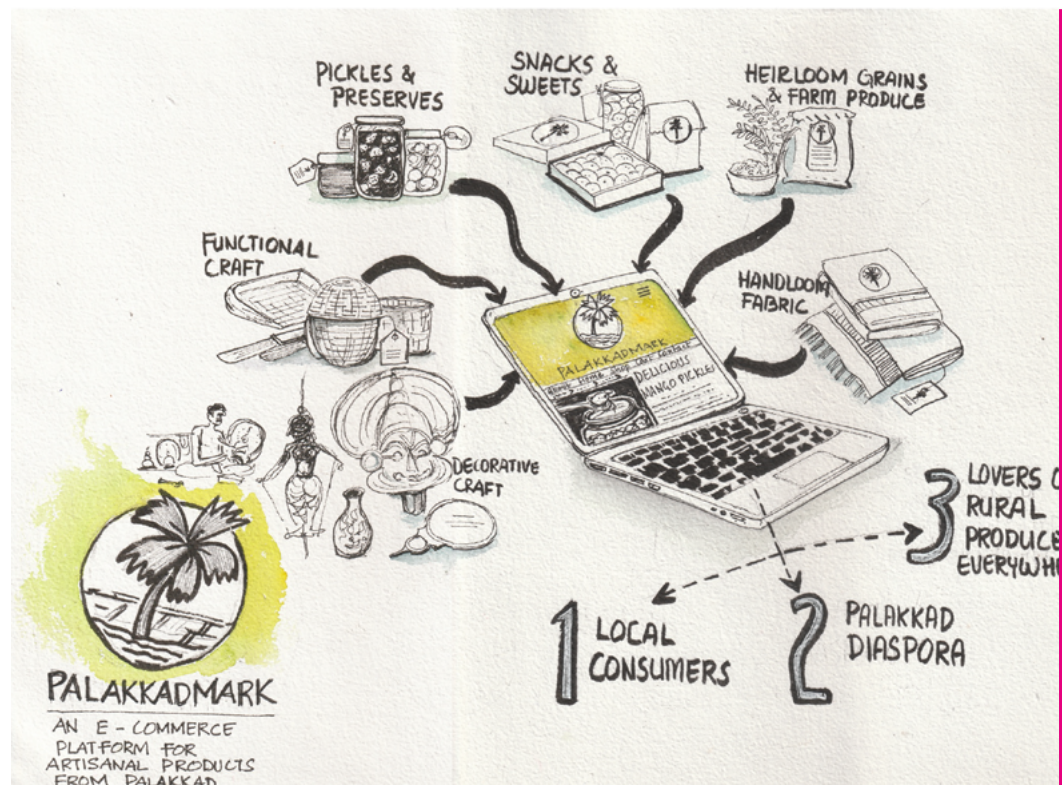
Response: Remaining connected to the public

INTO members are using a variety of tools and methods to connect their work to the public and the local communities during the pandemic. The most popular include social media posts, opening up landscapes in different ways while keeping buildings closed, and online video tours. But the ways of connecting are as varied as the National Trusts themselves.

- FAI – Fondo Ambiente Italiano (The National Trust for Italy) launched its ItaliaMiManchi (Italy, I miss you) campaign with a focus on local tourism. FAI used social media to present a different property, at the same time every night.
- The Trustees of Reservations in Massachusetts put all their farm shops online so that people could order in advance and swing by the farms to pick up groceries.
- The National Trust of South Australia streamed live concerts from (closed) historic places, while welcoming visitors to their parks and gardens.

A January 2021 webinar sponsored by INTO and the National Trust of Trinidad and Tobago highlighted new ways to utilize the crisis to institute changes for long-term good.

- A pilot project of the National Trust for the Cayman Islands and the government recruitment agency is designed to retrain young Caymanians. Focused on those previously working in the tourism industry, the training is focused on all aspects of the National Trust's work, from environmental protection to built heritage and history. When tourism returns, these individuals will work as ambassadors for Cayman and promote different messages around the benefits of sustainable tourism that move visitors beyond sun, sea and sand.



- With shortages in the shops during lockdown due to supply chain disruptions, the pandemic increased awareness of the importance of buying local. INTACH Palakkad (a regional office of the India National Trust) began work on an e-commerce platform where farmers and artisans can sell their products: from heirloom grains to local crafts. This is helping those in the local community and is also proving popular with the diaspora of Indians around the world.
- In Trinidad and Tobago, the National Trust's personalized 'Friends and Families' service is designed for small, private groups of up to eight people to take a tour at a time, date and location that suits them. This new offering is an excellent opportunity to have a pandemic 'staycation' while exploring the country's great outdoors and the fascinating history-laden sites.

Conclusion

Conservation. Awareness. Community. As we have seen in this report, each is essential to the mission of the world's National Trusts.

That work at the heart of the mission begins with deep, authentic, and lasting engagement with the local community. It relies on crafting an inspiring vision of commitment and sensitivity to the work at hand. It is open to the possibilities of unexpected resolutions that engagement invariably brings. It understands the broader mandate that provides the context for that work. It communicates the core principles and values with those in a position to help protect these irreplaceable treasures.

And in the midst of cascading crises, the world's National Trusts show their own resilience, responding boldly to the needs of the present.

National Trusts have protected monuments in nature — both man-made and those crafted by other hands — through earlier pandemics, world and civil wars, changes in climate, and other threats. They have shared and celebrated stories from our past that have opened new understandings of history and also of who we are today. Out of the experience stretching over 125 years, National Trusts have found that historic times such as these in which we find ourselves now generate interest in history. Alongside a real desire to protect those places that are part of our individual and collective memories and create our community identity, the pandemic provides another opportunity to focus on what matters.

Director-General of the National Trust Hilary McGrady put it so eloquently: “The places and things the National Trust cares for are needed now more than ever, as the nation needs to recuperate and recover its spirit and wellbeing. Our focus will remain on the benefit we deliver to people, every day.”

That is a focus that National Trusts across the globe continue to bring to their work.



Appendix 1:

A brief literature review of the field:

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Over the past few decades, the academic field of tourism studies has developed into an interdisciplinary exchange around concepts like sustainable development, cultural heritage tourism, and overtourism. This discourse has evolved significantly over the past ten years in particular, with many academics sharpening previous definitions, identifying extant phenomena, and introducing new models. What is overtourism, exactly? Do we understand “the tourist” and their interests differently today than we did even twenty years ago? How can heritage tourism be more inclusive? Summarizing the trajectory of an entire discipline is an inherently reductive effort; to that end, many literature reviews and case studies far exceed the scope and capacity of this study (see Russo 2016, Brown & Hall 2008, Porter & Salazar 2005). The intent of this brief literature review is to refer to academics whose work directly applies to the challenges and principles delineated in this report. To that end, it will profile the discourse around terms such as “sustainable tourism,” “cultural heritage tourism,” “overtourism,” and the relationships each of these concepts share with the role of local communities.

How has the field of tourism studies evolved?

The 2016 article “The new frontiers of the study of tourism: conceptual and epistemological challenges,” by Antonio Paolo Russo, describes the evolution of such paradigms and new approaches to observing and studying tourism, as they have been increasingly influenced by related fields in the social sciences. These influences have resulted in three significant pivots in the field of understanding tourism around **mobility**, **performativity**, and **creation**. The first pivot Russo identifies, **mobility**, is based on the work of John Urry, and is predicated on the notion that the constant movement of persons, information, and capital means that the relationships between self and surroundings (and how we conceive them) are in a perpetual state of flux. This complicates the relationship between tourist and place and defines tourism as active and ever-changing. The second, **performativity**, points out that “geometries of power” complicate the understandings of the visitor as “subject” and the place as “object.” Instead, the context in which people and place coexist results in a system which cannot be defined as distinct from daily life or even greater economic and political systems. The third pivot, **creation**, defines cultural tourism as an “encounter, relationship, and negotiation within the cultural-symbolic sphere in tourist destinations” (22). This structure emphasizes the formation of tourism as an establishment of cognitive relationships founded upon activities and events, spaces of exchange, and the ritual of the social environment. Such a structure celebrates bottom-up collaboration and eschews the top-down designations of “touristic” spaces and authorized narratives.

Sustainable tourism

The concept of sustainable tourism developed from the growing understanding that mass tourism does not always spur economic development that uplifts local citizens, protects ecological or cultural resources, and remains viable indefinitely. Some theorists as far back as the 1980s questioned whether one can even classify tourism as “development” due to its impacts upon local communities, economies, and ecologies (see Britton 1982, Hong 1985, Pattullo 1996, D'Sa 1999, via Brown & Hall 2004). Since then, more academics have broached the more complicated interrelationship between “development” and tourism (see de Kadt 1979, Lea 1988, Harrison 2001, via Brown & Hall 2004).

Cultural heritage tourism

Many academics have taken to defining “heritage tourism” and “heritage” itself (see Timothy & Boyd 2003, Graham et al 2000, via Porter & Salazar 2008). As Benjamin Porter and Noel Salazar point out in “Heritage tourism, conflict, and the public interest” (2008), conflict between stakeholders (guests, hosts, development agencies, local communities, etc.) is a central theme in explorations of cultural heritage tourism. Academics like Colin Hunter (1997), Jan Van der Borg (1999), and Antonio Paolo Russo have pointed out that while heritage tourism is different in many respects from mass tourism — in its greater resilience against the negative externalities of the “destination life-cycle” of geographers Butler and Christaller, for example — it is still capable of driving unsustainable development through risks of displacement, loss of authenticity, and fundamentally extractive dynamics.

Overtourism

The 2018 article, “Is Overtourism Overused? Understanding the Impact of Tourism in a City Context,” by Ko Koens, Albert Postma, and Bernadett Papp, clarifies the definition of “overtourism” and identifies seven common misconceptions surrounding the term. Koens et al point out that the term is “ill-defined, lacks clarity, and is highly difficult to operationalize.” The term has come to represent many negative phenomena related to tourism, and as such it can be attached to any issue and obfuscate cause, responsibility, and power. While they acknowledge that the definition is complicated, Koens et al identify the following seven common misconceptions:

1. Overtourism is not a recent phenomenon.
2. Overtourism is not the same as mass tourism.
3. Overtourism impacts are not city-wide
4. Overtourism is not a tourism-only problem.
5. Technological or smart solutions alone will not solve overtourism.
6. There is no one-size-fits-all solution for overtourism.
7. Overtourism is not just an issue in cities.

The push for precise language on tourism's impacts and their related city, societal, and mobility developments can empower change and improve discourse.

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