Figures are not readily available for the estimated proportions of NITB's staff and other running costs which relate to its work on the historic environment and we have therefore excluded these from our analysis. The above therefore represents a prudent assessment of the economic impact generated by NITB's activities.

Heritage Lottery Fund (HLF)

HLF undertakes a range of activities relevant to the historic environment via funding provided to the Land & Biodiversity and Historic Buildings & Monuments sectors.

Information provided by HLF indicates that, for the 2009-10 financial year, grant expenditure relating to the historic environment sector was some **£4.9m**, representing 87.4% of the HLF's total grant funding. Detailed information regarding the split of grant funding between capital and revenue assistance was not available.

In addition to the above, information sourced from HLF states that the organisation's staff cost relating to historic environment activities for 2009-10 was **£0.3m.**

Combining both these figures, we estimate that the direct economic impact arising from HLF's activities in relation to the historic environment is **£5.2m** per annum.

Figures are not readily available for the estimated proportion of HLF's other running costs which relates to the Fund's work on the historic environment and we have therefore excluded these from our analysis. The above therefore represents a prudent assessment of the economic impact which HLF's activities generate.

This is not necessarily a *net* increase in the economic value since HLF may have spent the same amount on another sector in Northern Ireland. However, the existing spending will have a real impact and this is what's reported above.

Department for Social Development

The remit of the Department for Social Development (DSD) includes urban regeneration, including investment relating to the historic environment in terms of urban development, neighbourhood renewal, community regeneration and improvement of the public realm.

Figures supplied by DSD's Urban Policy Review Branch for the 2009-10 financial year indicate that the Department's grant expenditure in relation to the historic environment was as follows:

- Capital grants: £9.9m; and
- Revenue grants: £0.2m.

Based on the above, we estimate that DSD's activities in respect of the historic environment generate an annual economic impact of some **£10.1m.**

Figures in relation to other staff costs incurred by DSD in relation to its historic environment work were not readily available and have not been included in our analysis. The figures estimated above therefore represent a prudent assessment of the economic impact generated by DSD's activities.

National Trust

Information supplied by the National Trust indicates that, of the Trust's annual spend of around £6.5m, approximately 16% is funded by Government. The remaining £5.5m represents an additional economic impact generated through the Trust's activities.

3.4.2 Construction Industry

Based on evidence from comparable jurisdictions, it is likely that a significant proportion of activity within the NI construction sector is related to repairs and maintenance to the infrastructure of the historic environment.

Table 3.3 below summarises the monetary value of all construction activity relating to repairs and maintenance within NI in 2010, through the use of data published by the NI Statistics and Research Agency (NISRA).

Table 3.3: Value of construction output on repairs and maintenance by quarter (current prices) (£ million)

Jan-Mar 2010	160
Apr-Jun 2010	151
Jul-Sep 2010	155
Oct-Dec 2010	166
	632

Source: NISRA – Northern Ireland Construction Bulletin (Oct-Dec 2010)

Information available on the proportion of Northern Ireland construction industry activity specifically attributable to the historic environment is limited. NISRA does not publish data in this level of detail and our discussions with the Construction Employers' Federation did not highlight what proportion of overall construction activity relates to the historic environment. We have therefore employed evidence-based assumptions in developing our impact estimates in this area.

We have considered what would be a reasonable assessment of the proportion of overall NI construction activity relating to the historic environment, by reference to recent studies in Scotland and Wales, and through discussions with the Project Steering Group.

A recent study (Ecotec, 2008) estimates that 20% of construction sector repairs and maintenance activity in Scotland is connected to the historic environment. Applying this proportion to corresponding activity in NI would yield a figure of some **£126.8m** at 2010 prices as a base-case estimate of the impact in this area. This figure equates to 5% of total construction output for NI, based on 2010 figures. A recent study in ROI (Ecorys, 2012) estimated that Ireland's historic environment accounted for approximately 4.2% of total national construction output.

In recognition of the degree of uncertainty inherent in any assumption, we have undertaken sensitivity analysis to reflect the impact of variations in the assumptions we have made in this area:

- Assuming only 15% of construction industry activity in Northern Ireland relates to the historic environment would lead to a lower estimate of overall impact of **£94.8m;** and
- Assuming that 25% of Northern Ireland construction activity is attributable to the historic environment would produce a higher estimated impact of **£158m.**

Based on our analysis, we therefore estimate the direct annual impact of the historic environment on the local construction industry is **£126.8m**, within a range of **£94.8m** to **£158m**, before any adjustment for double counting.

To avoid double counting within our analysis, we have taken account of the capital expenditure reported in our review of core organisations' activity. This is to lessen the risk of such expenditure being recorded as an impact twice (once as expenditure by a grant-making body and again as expenditure within the construction industry).

Major organisations within the historic environment sector such as NIEA, NITB, HLF and DSD offer grant assistance to a range of other entities as detailed above. This support includes both capital and revenue grants. However, information analysing the split of this assistance between capital and revenue components is not always readily available at organisational level.

To ensure our estimates of impacts arising within the construction sector are prudent, we have therefore adjusted our base estimates to exclude the total amount of grants payable by core organisations (which may include both capital and revenue elements if not analysed separately by the organisations in question). Table 3.3 below presents this analysis.

Therefore, after making a prudent adjustment for potential double counting, we estimate the direct annual impact of the historic environment on the local construction industry is **£85.3m**, within a range of **£58.3m** to **£112.3m**.

Table 3.3: Adjusted construction industry impacts – avoiding double counting

		Range	
		Lower Limit	Upper Limit
		£m	£m
Construction industry impacts before adjustment	**126.8**	**94.8**	**158.8**
Grants made by core organisations			
NIEA	(3.5)	(3.5)	(3.5)
NITB	(22.8)	(18.2)	(27.4)
HLF	(4.9)	(4.9)	(4.9)
DSD (capital only)	(9.9)	(9.9)	(9.9)
Subtotal	**(41.1)**	**(36.5)**	**(45.7)**
Construction industry impacts after adjustment	**85.3**	**58.3**	**112.3**

3.4.3 Tourism

Expenditure by tourists attracted by the historic environment is another key driver of the economic impact of heritage. Our work in relation to tourism included:

- Reviewing data published by the Department of Enterprise, Trade and Investment (DETI) on the overall value of out-of-state tourism to NI for the agreed base year (2010);
- Benchmarking the above tourism metrics against performance reported for Scotland and Wales, to assess the characteristics of the tourism industry in each jurisdiction;
- Considering the most suitable percentage of NI tourist income attributable to the historic environment, taking into account the results of previous studies in Scotland and Wales, and bearing in mind any differences in the patterns of tourist visitors to NI and the other jurisdictions considered; and
- Complementing the analysis undertaken at regional level with consideration of DETI's NI Visitor Attraction Survey, setting out visitor numbers and expenditure for heritage attractions (as categories and for individual sites).

To avoid double counting, we excluded any tourist income already identified through our work on core organisations within the historic environment sector.

In line with the Department of Finance and Personnel's NI Guide to Expenditure Appraisal and Evaluation (2009, Revised May 2011), the report principally considers tourism impacts by reference to **out-of-state** visitor numbers, encompassing:

- Visitors from the Republic of Ireland (ROI) staying at least one night in NI; and
- Visitors from Great Britain (GB) or overseas staying at least one night in NI and exiting by air or sea ports in NI or ROI.

Later in the report, by way of illustration, Section 3.10 presents information on domestic visitors to heritage attractions in Northern Ireland.

Tables 3.5 and 3.6 present details of total estimated out-of-state visitor numbers and their expenditure in Northern Ireland for 2010.

Table 3.5: NITB Northern Ireland Visitor Performance 2010 Estimates (published June 2011)

	No.	£m
ROI residents staying at least one night in NI	356,000	44.0
GB/overseas visitors staying at least one night in NI and exiting by air or sea port in NI or ROI	1,418,000	292.0
Total out-of-state visitor numbers/expenditure	**1,774,000**	**336.0**

Table 3.6: Comparison of per-capital out-of-state tourism visitor impacts in Northern Ireland, Scotland and Wales

	NI	Scotland	Wales
Base year	2010	2007	2009
Impact (£m)	336	1,461	610
Population (m)	1.799	5.144	2.999
Impact per capita at current prices	£187	£284	£203
Impact per capita at 2010 prices	**£187**	**£305**	**£209**

Source: estimates have been calculated based on various figures from National Statistics and websites of the three devolved administrations.

The analysis above indicates the economic impact per head of population of out-of-state tourist visitors to NI is marginally lower than in Wales and more markedly less than in Scotland. This suggests there is general potential to develop further the economic impact generated the tourism sector in NI.

Information available on the proportion of out-of-state visitors attracted to NI by its historic environment is limited and NITB does not publish data in this level of detail. While publications such as the NI Visitor Attraction Survey consider the proportions of in-state and out-of-state visitors for a range of sites related to the historic environment, there were a number of constraints attached to using this information for the purposes of our study:

- The Survey is based on responses from voluntary participants and cannot therefore be considered as representative of the sector; and
- Although the Survey records the geographical origin of visitors to attractions, it does not give consideration to whether out-of-state visitors have been primarily attracted to NI by its historic environment or by other factors.

In the absence of robust, appropriate data applicable to the NI context, we have therefore used evidence-based assumptions in developing our impact estimates in relation to tourism.

Recent reports produced for other comparable jurisdictions suggest that 20% of tourist visitors to Wales (Ecotec, 2010) and 33% of visitors to Scotland (Ecotec, 2008) are attracted by the historic environment sector. We were unable to identify comparative figures for the proportion of tourist visitors attracted to the Republic of Ireland by its historic environment.

Applying the proportion of visitors attracted by the historic environment identified in Wales (20%) to the overall value of out-of-state tourism for NI would produce an estimated impact of some **£67.2m** per annum.

Assuming 33% of tourist visitors are attracted by the historic environment (as in Scotland) yields an estimated annual impact within NI of **£110.9m.**

Using an intermediate estimate of 25% for the proportion of tourist visitors attracted to NI by its historic environment would lead to an annual impact of **£84.0m.**

We therefore estimate that the direct economic impact associated with historic environment tourism is **£84.0m**, within a range of **£67.2m** to **£110.9m**.

3.5 Gross and Net Direct Impacts - Outputs

The sum of all the above components represents our estimate of the direct economic impacts associated with NI's historic environment, in terms of output (Table 3.7).

3.5.1 Leakage

In assessing the degree to which the historic environment generates economic impacts within NI, we have also considered the issue of leakage (the degree to which benefits arising from economic activity leak outside the area where the activity takes place).

Leakage is likely to be low in respect of expenditure by core organisations, since their costs will include a significant element of remuneration paid to locally-based employees. It should be noted that detailed information is not available regarding the geographical patterns of subsequent expenditure at employee level.

Table 3.7: Gross Direct Impacts

			Range	
		Base	**Lower Limit**	**Upper Limit**
		£m	**£m**	**£m**
Core organisations				
	NIEA	11.1	10.9	11.3
	NITB	23.4	18.8	28.0
	HLF	5.2	5.2	5.2
	DSD	10.1	10.1	10.1
	National Trust	5.5	5.5	5.5
	Subtotal	**55.3**	**50.5**	**60.1**
Construction		**85.3**	**58.3**	**112.3**
Tourism (out of state)		**84.0**	**67.2**	**110.9**
Gross direct impacts – output		**224.6**	**176.0**	**288.3**

For construction and tourism, leakage is likely to be slightly higher (e.g. if construction contracts are awarded to suppliers outside NI, or if out-of-state visitors stay at hotels owned by operators not based locally).

Guidance issued by English Partnerships (2008) estimates that, for projects within the environment and housing sectors, leakage outside the region in which activity occurs is in the region of **6%** of associated outputs. In the absence of specific data for the NI context, or for comparable regions of Great Britain, we have applied this estimate as our assessment of leakage for NI, for the purposes of this study.

3.5.2 Displacement

The NI Guide to Expenditure Appraisal and Evaluation (NIGEAE)[3] defines displacement as the degree to which an activity promoted by government policy is offset by reductions in activity elsewhere. Thus it is generally important to identify the potential for displacement and assess its impact. The assessment should focus on displacement within NI, but if there are likely to be important displacement effects elsewhere in the UK, these should also be identified and considered.

Within our analysis of the economic impacts associated with the historic environment of NI, we consider factors which might lead to the sector's impact reducing activity in other areas of the economy such as:

- Whether expenditure by visitors to historic environment sites has a significant negative impact on expenditure at other tourist attractions;
- Whether construction industry expenditure on repairing and maintaining the historic environment leads to a significant reduction in construction spend in other areas of the economy; and
- Whether the creation of employment in the historic environment sector leads to labour shortages in other parts of the economy.

English Partnerships' Additionality Guidance (2008) identifies a typical displacement figure of **15%** for projects within the environment and housing sectors. In the absence of suitable NI-specific data, we have applied this estimate of displacement in our analysis for NI.

3.5.3 Adjustment for Leakage and Displacement

Table 3.8 overleaf presents details of estimated gross and net local impacts, after adjusting for leakage and displacement.

[3] http://www.dfpni.gov.uk/eag

Table 3.8: Gross and net local economic impacts

		Range	
	Base	**Lower Limit**	**Upper Limit**
	£m	**£m**	**£m**
Gross direct impacts – output	**224.6**	**176.0**	**283.3**
less Leakage (6%)	(13.5)	(10.6)	(17.0)
Gross local direct impacts – output	**211.1**	**165.4**	**266.3**
less Displacement (15%)	(31.7)	(24.8)	(39.9)
Net local direct impacts – output	**179.4**	**140.6**	**226.3**

3.6 Net Direct Impacts - Employment

The activity described above will have impacts in creating and sustaining employment within Northern Ireland. We have modelled this employment impact by estimating the amount of expenditure needed to create one full time equivalent (FTE) job in each area of our analysis, based on evidence from other recent, relevant studies:

- A recent study conducted in England by the North East Chamber of Commerce[4] (covering a region with many similarities to NI) estimated that every £1m of public expenditure on construction generated 20 FTE construction jobs; and
- A study of the NI tourism industry conducted by CogentSI (2007) also estimated that for every £1m of tourism spend, around 20 FTE jobs were created.

It is possible that the multiplier relating to historic environment tourism could be higher than 20:1 due to the labour-intensive nature of the sector However, based on the evidence available to us, and in the absence of data specific to the historic environment sector in NI, we have therefore applied a ratio of 20:1 between employment and output (£m) in estimating economic impact in terms of job creation. This would produce job creation figures in Table 3.9.

[4] Referenced in House of Commons Early Day Motion 703, 9 September 2010

Table 3.9: Net employment

	Base	Range	
		Lower Limit	Upper Limit
Net local direct impacts – output	**£179.4m**	**£140.6m**	**£226.3m**
Net local direct impacts – employment	**3,589**	**2,812**	**4,527**

3.7 Net Direct Impacts - Gross Value Added

We have also examined the impacts generated by the historic environment in relation to Gross Value Added (GVA), which may be defined as the value of the amount of goods and services that have been produced, less the cost of all inputs and raw materials that are directly attributable to that production.

DETI GVA data for NI do not provide specific information relating to the historic environment sector. In the absence of robust local data, we have made use of recent evidence from jurisdictions comparable to NI. Based on evidence from previous studies conducted in Scotland and Wales (Ecotec, 2008 and 2010), we have estimated that GVA relating to the historic environment is some **50%** of the value of total output. This would yield GVA figures in Table 3.10.

Table 3.10: Gross Value Added

	Base	Lower	Upper
	£m	£m	£m
Net local direct impacts – output	**179.4**	**140.6**	**226.3**
Total direct impacts – GVA	**89.7**	**70.3**	**113.2**

3.8 Total Impacts - Gross Value Added

After developing our estimates of the direct economic impacts attributable to NI's historic environment as detailed above, we considered the quantum of 'second round' effects, both indirect and induced.

In line with other recent studies in comparable jurisdictions, and in the absence of specific multiplier data for the historic environment sector in NI, we estimated these impacts by applying appropriate multipliers to the figures we derived for direct economic impacts in the following areas:

- **Output multiplier:** This multiplier was recently reported as 1.6 for Scotland and 1.7 for Wales (Ecotec, 2008 and 2010). On the basis of prudence, we have assumed that the corresponding multiplier for NI would be 1.6;
- **Employment multiplier:** This has been identified as 1.5 for Scotland and 1.6 for Wales. Again, we have prudently estimated the related figure for NI to be 1.5; and
- **GVA multiplier:** The multiplier in this area has previously been stated as 1.5 for Scotland and 1.7 for Wales. We have once more taken a prudent view in the multiplier used in the NI analysis, using the lower figure of 1.5.

Table 3.11 below presents the results of our analysis of output, employment and GVA before and after the application of multipliers.

Table 3.11: Total (direct + indirect) economic impacts (£ million, 2010)

		Range	
	Base	**Lower Limit**	**Upper Limit**
	£m	**£m**	**£m**
Total direct impacts – expenditure (core organisations, construction sector out-of-state tourists)	179.4	140.6	226.3
Multiplier	1.6	1.6	1.6
Total impacts – output	**287.1**	**225.0**	**362.2**
	FTE	**FTE**	**FTE**
Total direct impacts – employment	3,589	2,812	4,527
Multiplier	1.5	1.5	1.5
Total impacts – employment	**5,383**	**4,218**	**6,790**
	£m	**£m**	**£m**
Total direct impacts – GVA	89.7	70.3	113.2
Multiplier	1.5	1.5	1.5
Total impacts – GVA	**134.6**	**105.5**	**169.8**

FTE: Full time equivalent jobs; GVA: Gross Value Added

3.9 Public / Private Sector Spending

In the historic environment sector, like in many others, public sector is likely to encourage spending by private sector and individuals.

Table 3.12 compares the information collected for the analysis above and shows that for **each £1 spent by NI core organisations for the historic environment, private sector (construction and out-of-state tourists) spends £3-4**.

However, there are a number of significant caveats to this ratio and hence it should be treated as purely illustrative. In particular, the comparison does not imply causality as there are many other reasons unrelated to public expenditure why private sector invests in / spends for the historic environment. In other words, the 'additionality' around the estimated impacts generated by public investment is unclear (i.e. whether the economic activity estimated for the historic environment would have occurred even in the absence of public investment). It should also be noted that spending in any given year is likely to be influenced by spending over several previous years. Nevertheless, the ratio is an interesting figure for further policy development.

N.B. Analysis carried out by NIEA identifies that the grant aiding of the maintenance and repair of listed buildings has a proven leverage ratio of on average 1:7.65 for every pound invested.

Table 3.12: Public – private expenditure ratio (2010)

		Range	
	Base	**Lower Limit**	**Upper Limit**
	£m	**£m**	**£m**
Public investment by core organisations (NIEA, NITB, HLF, DSD, NT)	**55.3**	**50.5**	**60.1**
Construction	85.3	58.3	112.3
Tourism (out of state)	84.0	67.2	110.9
Private-sector activity	**169.3**	**125.5**	**223.2**
Cost-effectiveness ratio	3.1:1	2.5:1	3.7:1

3.10 Impact of Domestic Tourism

As noted in preceding sections, and in line with DFP economic appraisal guidance (NIGEAE), our analysis above does not take into account the impact of domestic tourism (i.e. visits to historic environment sites by citizens resident in NI).

In this section, we estimate the economic impact associated with domestic leisure day visits to historic environment attractions within NI. In the absence of specific data from the NI Visitor Attraction Survey, and in view of the relatively short travel distances involved for domestic tourists in visiting attractions within NI, we have adopted a prudent assumption that all domestic visits to historic environment sites will involve day trips rather than overnight stays.

Spend per Visitor

The CogentSI report (2007) estimated that expenditure by in-state same-day visitors within Northern Ireland amounted to £712.2m (at 2003 prices). This is equivalent to **£849.2m** at 2010 prices after applying the UK Treasury GDP deflator.

In arriving at this figure, CogentSI also estimated that each resident of NI undertook some 16 leisure day trips per annum. Applying this ratio to NI's 2010 population of 1.799 million indicates that domestic visitors undertake some **28.8 million** in-state day trips a year.

Combining the above findings suggests that NI domestic visitors spend an average of **£29.49** per in-state same-day leisure visit.

Domestic Visitors to Historic Environment Sites

As with out-of-state tourism, constraints exist in relation to the availability of specific information on NI residents visiting historic environment attractions. DETI's Northern Ireland Visitor Attraction Survey collates information on visitor numbers from a range of voluntary participants, most of which fall within the definition of the historic environment adopted for this study. While the attractions covered cannot be considered as a representative sample of the sector, the latest available survey indicates that, of 9.7m visits during 2010, **6.5m** (66%) were undertaken by NI residents. At an average spend per visit of £29.49, this would yield an estimated total output of **£191.7m** per annum arising from domestic tourism. The estimated impacts of including domestic tourism in our analysis (with a general sensitivity of +/-20% applied) are presented in Tables 3.13 - 3.16.

Table 3.13: Gross and net local economic impacts – domestic leisure day visits

		Range	
	Base	**Lower Limit**	**Upper Limit**
	£m	**£m**	**£m**
Gross direct impacts – expenditure Domestic leisure day visits	**191.7**	**153.4**	**230.0**
less Leakage (6%)	(11.5)	(9.2)	(13.8)
Gross local direct impacts	**180.2**	**144.2**	**216.2**
less Displacement (15%)	(27.0)	(21.6)	(32.4)
Net local direct impacts	**153.2**	**122.6**	**183.8**

Table 3.14: Net employment - domestic leisure day visits

		Range	
	Base	Lower Limit	Upper Limit
Net local direct impacts – expenditure	**£153.2m**	**£122.6m**	**£183.8m**
Net local direct impacts – employment (20 jobs per £1m)	**3,064**	**2,452**	**3,676**

Table 3.15: Gross Value Added - domestic tourism

	Base	Lower	Upper
	£m	**£m**	**£m**
Total local direct impacts – GVA (50% of output)	**76.6**	**61.3**	**91.9**

Table 3.16: Total (direct + indirect) impacts - domestic leisure days

		Range	
	Base	**Lower Limit**	**Upper Limit**
	£m	**£m**	**£m**
Net direct impacts – expenditure Domestic leisure days	**153.2**	**122.6**	**183.8**
Multiplier	1.6	1.6	1.6
Total impacts – output	**245.1**	**196.2**	**294.1**
	FTE	**FTE**	**FTE**
Total direct impacts – employment	**3,064**	**2,452**	**3,676**
Multiplier	1.5	1.5	1.5
Total impacts – employment	**4,596**	**3,678**	**5,514**
	£m	**£m**	**£m**
Total direct impacts – GVA	**76.6**	**61.3**	**91.9**
Multiplier	1.5	1.5	1.5
Total impacts – GVA	**114.9**	**92.0**	**137.9**

FTE: Full time equivalent jobs; GVA: Gross Value Added

The results of our analysis indicate that the construction sector generates a broadly similar impact to the tourist sector in relation to the historic environment in NI. This is consistent with the findings of recent work undertaken in Scotland. However, a similar study completed in Wales indicated that the construction sector was of greater importance in terms of impact.

4. Case Studies

The following case studies are prepared for this project:

- St Patrick's Heritage;
- Causeway Coastal Route;
- Derry City Walls and Ebrington Barracks;
- Navan Centre and Armagh;
- Lough Erne and Fermanagh;
- Belfast Cathedral Quarter; and
- Belmont Tower.

There are also short overviews of historic waterways and canals and of the marine historic environment.

The criteria used to select this small number of case studies amongst the vast heritage assets in Northern Ireland included the following:

- Geographical coverage across Northern Ireland;
- Benefit type (environment, heritage, regeneration) – linked to themes below
- Asset type (need to decide what these are first);
- Ex-ante vs ex-post analysis (some case studies have planned extensions for example);
- Coverage of 'signature projects' (e.g. Titanic, Mourne, Giant's Causeway, Derry City Walls etc.);
- Themes (as listed in the terms of reference to this project: tourism, regeneration, learning, environment and community cohesion / social inclusion) and
- The potential usefulness of the case study for future management decisions.

Table 4.1 overleaf summarises the key characteristics of the case studies and further detailed summaries are provided within Annex 3 of this report. The full case studies are presented in separate documents.

Table 4.1: Overview of Case Studies

THEME/ASSET(S)	TYPE	LOCATION	DESCRIPTION
ALL ENCOMPASSING THEME			
St Patrick's Heritage	Historic and cultural	Across Northern Ireland with links to ROI	A Signature Project with extensive links to other types of assets.
TOURISM			
Causeway Coastal Route (including Dunluce and Carrickfergus Castles)	Historical ALSO "Environment"	Antrim	Dunluce Castle: Dramatically sited castle ruins on Causeway Coast. Good numbers of overseas visitors. Carrickfergus Castle: Well preserved Norman castle. Providing exhibition facilities. Available for hire for functions/events.
COMMUNITY			
Derry Walls	Historical / Cultural ALSO Regeneration	Derry-Londonderry	Historical attraction epitomising history of Derry-Londonderry and NI. Relevant to the regeneration of Derry-Londonderry, but not the only catalyst for this. Fourth most visited attraction. Signature Project.
Ebrington Barracks	Historical / Cultural ALSO Regeneration	Derry-Londonderry	A military barracks, which was used as a navy training base and subsequently returned to the Army. Now subject of major re-development to provide mixed use and shared public space, forming a key part of a City wide regeneration plan.
LEARNING			
City of Armagh, including Navan Centre	Visitor centre. Archaeological Reconstructed Iron Age buildings	Armagh	Visitor centre with strong emphasis on children/education, but also prehistoric site.
ENVIRONMENT			
Lough Erne	Environment / Archaeological / Tourism	Fermanagh	Cultural tie-in through historic regatta. Sites of early settlement and monastic sites mostly on island in Lower Lough. These include ruins of Devenish Abbey, the Janus and Lusty Man stones of Boa Island and fortified/castles of Monea and Tully.
REGENERATION			
Cathedral Quarter	Historical / Cultural	Belfast	Historic commercial district centred on St. Anne's COI Cathedral and Merchant Hotel but with many older buildings, galleries, proposed arts projects and connections with historical literary figures. Annual arts festival attracting high profile acts.
Belmont Tower	Historical / Cultural	Belfast	Restoration of B+ listed building, which has links to the author CS Lewis.

Key Findings

The case studies highlight a number of common issues in terms of realising the economic potential of NI's historic environment, including:

- Ensuring that benefits that are derived from the historic environment flow to all parts of local communities (e.g. hotel and commercial space developments alongside public access attractions);

- Engaging the local population through community workshops and open days and evenings during the re-development phase;

- Encouraging first time and return visits through authentic re-creation of the historic atmosphere such as re-enactment events, regular educational and entertainment activities, targeted communication with the public and provision of covered areas that could both accommodate large events and avoid weather issues;

- Embracing modern technology such as providing audio-trails both on site and on line (such as podcasts and applications) that provide more and attractive information about the sites;

- Strengthening links between individual assets, building on the value and appeal of groups of assets to sustain and lengthen visitor stay and engagement For example:

    - The Belmont Tower Case Study demonstrates the benefits of establishing links between the building and its association with the literary heritage (for example CS Lewis) of the surrounding area of Belfast;

    - The Causeway Coast and Glens Case Study illustrates the potential benefits of forming connections between a range of heritage sites across this relatively large geographical area;

    - The Lough Erne Case Study identifies the Lough's link to the larger Shannon-Erne Waterway. Reopening the Upper Ulster Canal linking Upper Lough Erne with Lough Neagh would increase its accessibility and potential for further recreational activities;

- Strengthening links with historic environment assets in other countries, especially in the Republic of Ireland, the USA and Canada applying for internationally recognised status such as World Heritage Site designation would attract out of state tourism;

- Themes (tourism, regeneration, learning, environment and community cohesion / social inclusion) that are relevant to a site should be considered together when designing and marketing a site;

- Raising the core organisations' and site managers' awareness of what constitutes economic benefit, in particular, that economic benefit is not limited to tourism spending.

Key areas of benefit highlighted by the case studies include:

Economic

- Attracting visitors and creating jobs
- Increased footfall in areas in need of regeneration
- Enhancement of night-time economy

Social

- Community cohesion
- Sense of identity and place
- Civic pride and wellbeing
- Creating safer and shared spaces
- Focal point for wider regeneration
- Skills development and volunteering opportunities

5. Conclusions and Recommendations

5.1 Economic Impacts and Employment Opportunities

Our quantitative assessment of economic value has been informed by an analysis of:

- Expenditure by core organisations (NIEA, NITB, HLF, DSD and NT) on the historic environment;
- The portion of construction industry output that can be associated with the historic environment; and
- Spending by out-of-state and domestic tourists as a result of the historic environment. For domestic tourists, only leisure day visits are included.

The multiplier effects of this spending and the employment effects are also considered.

In summary, our analysis indicates that before the impact of domestic tourists is included, NI's historic environment:

- Generates some £287.1m of output per annum, within a range of £225.0m to £362.2m;
- Creates or sustains 5,383 jobs, within a range of 4,218 to 6,790; and
- Supports some £134.6m of GVA each year, within a range of £105.5m to £169.8m.

The benefits from leisure day visits to historic environment sites by Northern Ireland residents are estimated as:

- Output - £245.1m;
- Employment - £4,596 FTE jobs; and
- GVA - £114.9m.

Therefore, including domestic tourism yields a total estimated GVA of some £249.5m per annum in relation to NI's historic environment.

Tables 5.1 and 5.2 provide a breakdown.

Table 5.1: Total (direct + indirect) economic impacts (£ million, 2010)

	Base	Range	
		Lower Limit	Upper Limit
	£m	£m	£m
DIRECT IMPACTS			
Total direct impacts – output (core organisations, construction sector out-of-state tourists)	179.4	140.6	226.3
Total direct impacts – domestic leisure days	153.2	122.6	183.8
TOTAL IMPACTS (direct + indirect, i.e. multiplier)			
Multiplier	1.6	1.6	1.6
Total impacts – output* (core organisations, construction sector out-of-state tourists)	**287.1**	**225.0**	**362.2**
Total impacts - output (domestic leisure days)	**245.1**	**196.2**	**294.1**
DIRECT IMPACTS GROSS VALUE ADDED*			
Total direct impacts – GVA** (core organisations, construction sector out-of-state tourists)	89.7	70.3	113.2
Total direct impacts – GVA (domestic leisure days)	76.6	61.3	91.9
TOTAL IMPACTS (direct + indirect) GROSS VALUE ADDED*			
GVA multiplier	1.5	1.5	1.5
Total impacts – GVA (core organisations, construction sector out-of-state tourists)	**134.6**	**105.5**	**169.8**
Total impacts – GVA (domestic leisure days)	**114.9**	**92.0**	**137.9**
TOTAL IMPACTS - GVA	**249.5**	**197.5**	**307.7**

*GVA: Gross Value Added calculated as 50% of total direct impacts

The GVA generated by the sector (excluding domestic tourists) compares as follows to neighbouring jurisdictions:

- **Republic of Ireland:** €1.46 bn (c £1.2 bn)
- **Scotland:** £2.375 bn; and
- **Wales:** £840m.

Table 5.2: Employment impacts (2010)

	Base	Range: Lower Limit	Range: Upper Limit
	FTE	FTE	FTE
DIRECT IMPACTS			
Direct impacts – employment (core organisations, construction sector out-of-state tourists)	3,589	2,812	4,527
Direct impacts – employment (domestic leisure days)	**3,064**	**2,452**	**3,676**
TOTAL IMPACTS (direct + indirect, i.e. multiplier)			
Multiplier	1.5	1.5	1.5
Total impacts – employment (core organisations, construction sector out-of-state tourists)	**5,383**	**4,218**	**6,790**
Total impacts – employment (domestic leisure days)	**4,596**	**3,678**	**5,514**
TOTAL IMPACTS - employment	**9,979**	**7,896**	**12,304**

FTE: Full time equivalent jobs.

The employment level generated by the sector (excluding domestic tourists) compares as follows to neighbouring jurisdictions:

- **Republic of Ireland:** 36,947;
- **Scotland:** 60,473; and
- **Wales:** 30,000.

In order to put the above estimates into context, when compared to other sectors within the NI economy, an annual GVA of £249.5 million is equivalent to:

- Circa 11% of the GVA produced by NI Construction sector in 2010 (total GVA £2,261 million); and
- Circa 33% of the 2010 GVA produced by the NI Information and Communication sector (total GVA £740 million).

The source for the GVA estimates for other sectors is DETI (2011).

The table below summarises per-capita impacts in terms of output, employment and GVA across Northern Ireland and neighbouring jurisdictions (excluding domestic tourism):

	NI	ROI	Scotland	Wales
Base year	**2010**	**2009**	**2007**	**2009**
Population (m)	**1.799**	**4.588**	**5.144**	**2.999**
OUTPUT				
Total impact (current prices)	£287.1m	£2,190m	£4,515.5m	£1,837.1m
Impact per capita (current prices)	£160	£477	£878	£613
Impact per capita (2010 prices)	**£160**	**£491**	**£943**	**£631**
EMPLOYMENT				
Total impact	5,383	36,947	60,473	30,000
Impact per thousand of population	**3.0**	**8.1**	**11.8**	**10.0**
GVA				
Total impact (current prices)	£134.6m	£1,200m	£2,375m	£840m
Impact per capita (current prices)	£75	£262	£462	£280
Impact per capita (2010 prices)	**£75**	**£270**	**£496**	**£288**

The analysis above highlights that the historic environment in NI produces a lower level of output, employment and GVA than its neighbouring jurisdictions, when assessed on a per capita basis, thereby suggesting that there is significant potential to further develop the historic environment sector in NI.

5.2 Wider Economic (Social) Benefits

A list of wider economic (social) benefits of the historic environment has been highlighted by the stakeholders who responded to our survey. They believed that the historic environment generates a range of benefits for visitors and non-visitors alike that can be expressed qualitatively. The principal benefits stated by respondents were:

- A sense of identity and history (84% of respondents);
- Preservation of heritage for future generations (79% of respondents);
- Provision of a better living environment (79% of respondents);

- Economic regeneration (e.g. increased tourism income and employment) through heritage conservation and renovation (79% of respondents); and
- Provision of access to historic environment sites for those who are from socially and economically disadvantaged communities (68% of respondents).

5.3 Recommendations

Case studies have highlighted a number of common issues including:

- Financial viability and sustainability of sites;
- Ensuring that benefits that are derived from the historic environment flow to all parts of the society; and
- Strengthening links between individual assets and events to increase awareness.

A number of recommendations, which can help address these and other sector development issues, are provided below for further consideration:

1. **Future investment in the Historic Environment should be informed by a coherent strategy and implementation plan.** An implementation group should be established to develop a strategy/implementation plan that aims to realise the full potential of the historic environment and prioritise future investment activity. The Strategy should be embedded in the Programme for Government, involve other government departments/ NGOs in its implementation and provide a robust framework for future monitoring/evaluation of investment activity. Any future monitoring framework should ensure a consistent approach to data capture across a range of agreed output, impact and value for money measures.

2. **Public sector funding should be increased to realise further economic and social benefit and to encourage private sector involvement**. Comparison of the economic impacts of the historic environment to other sectors shows that historic environment is a significant sector within the NI economy, however the historic environment in NI produces a significantly lower level of output, employment and GVA than its neighbouring jurisdictions, when assessed on a per capita basis. This suggests that the sector has further development potential.

3. **The presentation of historic environment sites should be reviewed to enhance their visitors experience and to maximise their impact**. The visitor experience to a given site improves when:

    - The history and cultural heritage of the site is conveyed in an easily accessible way;
    - Clear signage is used on the way to and in the site;

- Connections between the site and other sites / assets are developed / enhanced; Historical aspects of the site are linked to other aspects such as culture, literature, and the environment; and
- The brand message is enhanced in terms of ensuring delivery against the significant perception of the uniqueness and authenticity of the experience; identifying opportunities to deliver this through uncovering stories; and developing interpretation to maximise the opportunities for uncovering stories and learning.

In addition to the above, sites can encourage higher spend by visitors (e.g. package / cluster product around eating/retail/culture experiences; provide demonstration and sales opportunities for local craft providers; and develop branded souvenirs and identifying opportunities to sell in the area.

4. **To sustain and increase the present level of impact generated by the historic environment in NI, current levels of marketing and promotion should be at the very least maintained.**

   All principal means of marketing and promoting historic environment attractions should continue, including:

   - The organisations' own websites and other websites;
   - Printed brochures and literature;
   - Stands at festivals and tourism fairs;
   - Social media sites; and
   - Television and radio.

5. **Organisations involved in the historic environment should consider ways of expanding their existing linkages with suitable partners (including those with a focus on the natural environment) to coordinate marketing and promotion efforts**. Collaboration between a range of partners in delivering activities relevant to the historic environment creates benefits in the form of:

   - Increased profile and higher visitor numbers for attractions;
   - Access to additional funding sources;
   - Networking potential;
   - Provision of specialist technical advice from other organisations;
   - Joint promotional activities; and
   - Sharing of information and ideas for visitor development.

6. **An economic impact toolkit should be developed for use within the historic environment sector**. As identified above, future investment within the sector should be supported by the development of a robust monitoring/ evaluation

framework. Future monitoring activity could be supported by the development of an economic impact toolkit, to ensure that a consistent approach to data capture is applied across the sector. The toolkit could also show how to make the best use of information for the management and promotion of the historic environment.

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Annex 1: Principles of the economic value of the historic environment

Built heritage can be a private good, in that it may be owned or used by an individual, a company or a trust (use values). However, the protection of the historic environment cannot be left solely to the market as it is likely to be valued by people other than the owner, including local residents, people from outside an area and, indeed, generations who have yet to be born. As such the historic environment has characteristics of a *public good* (the entirety of the Total Economic Value typology) (Figure 2.1). It is not possible to exclude some people from consuming public goods and their consumption does not impact on the demand for other goods.

In practice, built heritage falls along a continuum from private good to public good. One particular building of heritage value could be free to visit and much used by the community. Another may house a business to which visits by the general public would not be possible or free. In the former, the public good benefits may be sufficiently large for government to wholly or partially support the building and responsibility for its upkeep. However, even in the latter case, there can be public benefits from the building's very existence, namely its contribution to the identity or attractiveness of a neighbourhood in which all members of the community share. This also justifies public support.

The demand curve

This spectrum of economic values shown in Figure 2.1 is demonstrated within the demand curve that forms a familiar feature of any economic analysis. The ticket receipts from people visiting a heritage site provide one important expression of value. The graphical expression of demand follows a downward sloping curve as in Figure A.1 where higher ticket prices induce less demand and lower prices more demand. For instance, at very high entrance fees, namely P_H, few people would be willing to pay to visit. If access were to be free at P_0 many people will visit. More strictly, the demand curve is a marginal **willingness to pay** curve (WTP) which shows the WTP of visitors for, say, one more visit. There is ample evidence to suggest that the demand for heritage assets behaves in the manner described in the figure. By taking an overall demand curve based on all the visitors who would be attracted by different levels of price the area below the demand curve can be calculated, which will give the total benefit (price x quantity) from demand.

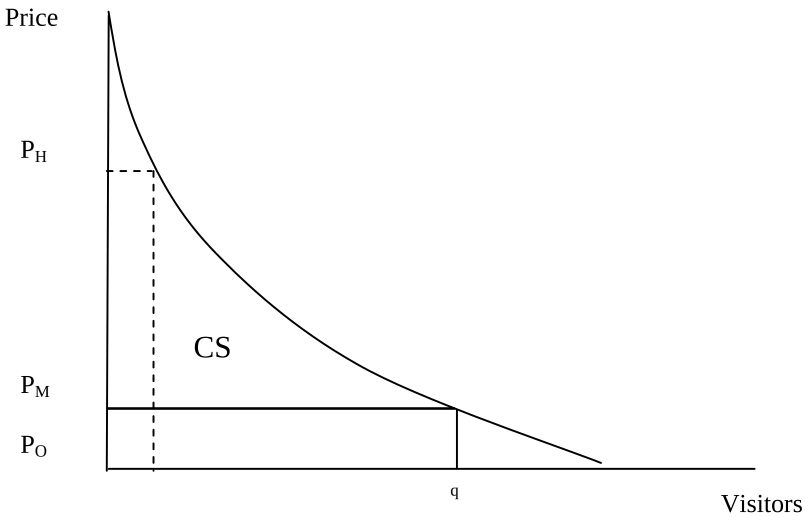

Figure A.1: Stylised demand curve

Supply follows a similar pattern but in reverse where, for instance, higher prices induces greater supply. Through the market a price (P_M) is reached where there is equilibrium between demand and supply. However, high prices (e.g. P_H) some people are willing to pay more than the ruling price. In effect they get something for nothing. The area above price but beneath the demand curve is described as the **consumer surplus**. In Figure A.1 it is represented by the area CS and can be substantial for some goods.

Typically, it is not possible to capture all the consumer surplus value that people place on a marketed good. Not least, because consumers are not all the same. Rather, they consist of a multitude of population types, income levels and preferences so that the consumer surplus for one individual could be much greater, or smaller, than for another consumer. Suppliers often try to differentiate between users by charging different fees so as to capture as much of the revenue from the demand curve as possible. Mobile phone networks or transport operators are classic examples. Nevertheless, even in these markets it is very difficult to capture most of the consumer surplus. It is practically impossible to do for heritage. Not least, in many cases, heritage is a public good that is not excludable or is publically owned with free access. Indeed, because private owners are unable to extract the full consumer surplus from heritage, a **market failure** exists whereby there is under-provision of heritage in relation to demand. Consequently, government, recognising the public good value, commonly fills the void by taking into ownership features of heritage interest. The question is to what extent should they do so to reflect the value of heritage to society?

Valuation methods

Entrance fees provide a partial estimate of the value that most visitors place on a heritage good, but the wider expenditure of visitors allows us to estimate a larger portion of total value (consumer surplus) that they attach to the good. If we know how important a site is to the decision to visit a city or region, then we can allocate a matching proportion of the visitors' expenditure on accommodation, food or related items to value the historic environment.

An extension of expenditure is the amount that people spend in choosing to travel to a location including, in the case of visitors from outside of Ireland, the amount they spent on ferry or air fares. This particular approach is known as the **travel cost method** (TCM). With many valuation methods it is important to identify the exact contribution of the good in relation to total expenditure, but this is especially pertinent to the TCM as tourists may visit many locations, including more built heritage features, natural heritage or other destinations, not to mention friends or family. The value of time is often included in TCM, but can vary considerably by individual, the time of their visit and whether any income-earning time was foregone.
Alternatively, the **hedonic pricing method** (HPM) estimates the contribution of non-market factors to property values. Research by the Nationwide Building Society demonstrates that older, i.e. pre-1960s, properties typically attract higher sale values (English Heritage, 2010). This price appreciation also extends to the wider neighbourhood. For built heritage in Berlin, Ahlfeldt and Maenning (2010) find evidence of a positive price effect due to heritage conservation extending to a radius of 600m. Similar results have been found for established or historic town parks.

However, even these expenditure or 'revealed preference' approaches can, at best, only throw light on the full extent of the consumer surplus. Another approach is that of 'stated preference'. The most commonly used method under this approach is the **contingent valuation method** (CVM). With this method, people are asked in a survey how much they would be willing to pay in total for a particular good or outcome. For example, this approach was used by the Heritage Council (2007) to estimate the value that people place on heritage conservation of in the Republic of Ireland. It is important that contingent valuation studies are undertaken very carefully, informing people of the nature of the good in question and its context, but without leading the person to give certain responses, and that this is done for a representative sample of the population. Nevertheless, contingent valuation surveys vary in their sophistication particularly with regard to the willingness to pay question and its analysis. Typically, the willingness to pay question asks how much the respondent would be prepared to pay for a marginal change in the good, for example, increased protection. This is because it is difficult to get an accurate answer for the good in its entirety, especially where there is already some provision to which people may feel an entitlement.

A related approach is the use of **choice experiments** (CE). Whereas CVM can be useful for providing an overall value, CE presents survey respondents with a set of trade-off exercises in which a range of attributes are used to characterise the public good. It then asks the respondents to choose between scenarios in which different attributes are provided at different levels. For example, respondents could be asked to trade-off the choice of interpretive signs, guides and brochures, or a visitor exhibition, and to do so along with choices of other heritage attributes. The average willingness to pay for any one level of an attribute can be expressed in monetary terms if one of the attributes is the cost, for example an entrance fee.

Unfortunately, while there have been many applications of stated preference methods to natural heritage, including in Ireland to forests, the agri-environment, parks and peatlands built heritage, there have been few applications to built heritage and none in Ireland of which we are aware. Box 1 provides examples of international studies. Nevertheless, despite this shortcoming, what we find is that revealed or stated preference can only supply a partial answer and that there is, in fact, a whole succession of approaches that can be called into play to estimate the economic value of built heritage. No single approach can achieve the job especially where economic values extend into the social or cultural dimension.

Box 1: Economic Valuation Studies and the Historic Environment

Economic valuation methods emerged during the 1980s and have continued to develop through the 1990s and into the new century. Travel cost and contingent valuation were amongst the earliest valuation methods to be generally applied, with the latter commonly use open-ended or payment card based means of elicitation. The dichotomous choice (willing to pay £x? - yes or no) means of elicitation became more popular in the 1990s, followed by choice experiments even though the former approaches still have their merits for certain situations. Choice based approaches were applied to the field from the late nineties along with mixed choice and hedonic methods.

Despite all this activity, the over-whelming proportion of studies has been applied to the natural environment. Very little has been applied to cultural heritage even though management strategies and policies for protection are equally necessary. One such study was conducted by Navrud and Strand (2002) on the amount that visitors to Nidaros Cathedral in Trondheim, possibly the most important cultural object in Norway were prepared to pay to a fund to protect the building from air pollution damage. Based on 165,000 visitors per year, the aggregate value was estimated at around 50 million NOK per person per year (1991 values). The sum is far greater than the actual cost of cleaning which was estimated at 9.5 million NOK.

Although the value was aggregated based on visitors, the use value component was identified to be just 14% of the WTP. In other words, respondents valued the Cathedral for its existence value more than for the utility of visits alone. Applying these same non-use values to the general Norwegian population, the value of preservation to the total Norwegian population was estimated at 810 million NOK. However, acknowledging that non-visitors were likely to have relatively lower non-use values, the researchers assume the real values to have been 30% less. The quoted figures included some control for embedding, a common bias that can arise where people express their willingness to pay for all historic environment, not just the one site they are asked about.

Applying contingent valuation to a castle, cathedral and historic town centre in Northumberland, England, Garrod and Willis (2002) are more sanguine. Their study demonstrated that the public may hold substantial values for cultural heritage, but that this cannot necessarily be equated with a willingness to pay higher entrance fees. Rather, they acknowledge that a substantial public good value exists that can be difficult to capture either in studies or in reality, necessitating the use of public funds to maintain cultural heritage.

Annex 2: Stakeholder Survey

VALUE OF NORTHERN IRELAND'S HISTORIC ENVIRONMENT

Thank you for offering to assist us with this study into the economic value of Northern Ireland's historic environment. This questionnaire aims to collect information that will help analyse this economic value. The results of the analysis will help build a business case for the protection and sustainable use of the historic environment; and assist in long term strategies to increase the current economic value.

All information gathered as part of this survey process is considered confidential and will only be reported on an aggregated basis.

Expected Completion time: **45 Minutes**

SECTION 1 – ABOUT YOU AND YOUR ORGANISATION

Q1 Contact details:

Name:
Job title:
Organisation:
Email:
Tel:

Q2 Which of the following types of site relating to the historic environment relate to your organisation's activities, directly or indirectly? (Select all that apply)

Site	**Please Tick**
Listed/historic buildings	
Archaeology sites	
Conservation areas	
Gardens/designed landscapes	
Historic landscapes	
Marine historic environment	
Natural environment	

SECTION 2 - VISITORS

NB: Please only complete this section if your organisation has a role in managing historic environment sites that allow access for visitors and tourists.

Q3 For historic environment sites under your organisation's ownership or management, please provide overall total number of visits in each of the last three years (use n/a to indicate not available)

Site	**2008**	**2008**	**2010**
...	...	...	...

Q4 What means do you use to collect data on visitor numbers?

Method	**Please Tick**
Ticket sales	
Counters	
Car park usage	
Other estimate	

Q5 Over the last five years, have you observed:

Observation	**Please Tick**
An increase in visitor numbers	
A decrease in visitor numbers	
No significant change in visitor numbers	

Q6 In your opinion, what are the reasons for the trends in visitor numbers observed in the past five years? (max 100 words)

Q7 What is the overall geographical composition of visitors to your organisation's historic environment sites between the following:

	2008	**2009**	**2010**
Northern Ireland			
Great Britain (England, Scotland, Wales)			
Republic of Ireland			
Rest of Europe			

USA/Canada			
Rest of the world			
Not known			

Q8 For historic environment sites under your organisation's ownership or management, what overall proportions (%) of visitors are represented by:

	2008	**2009**	**2010**
Individuals / couples			
Families			
Tours			
Business sector/corporate groups			
Other adult groups			
School visits			
Others (Specify if possible)			
Not known			

Q9 If known, what is the average length of visitors' stay in the vicinity of your organisation's sites? (broken down if possible by different types of visitors listed above)? Please indicate the base year for the data.

Q10 If known, what overall proportion (%) of visitors to your organisation's historic environment sites stay overnight in NI and what proportion (%) are day trippers?

Q11 Do you have any data on the reasons why visitors come to Northern Ireland / the site(s) your organisation is responsible for? For example:

- Holiday
- Visiting family
- Business
- Other

Q12 If you have this information, what proportion (%) of your visitors state the historic environment as the primary reason they visit Northern Ireland? This could include:

- Visiting heritage sites
- Visiting specific attractions within the historic environment
- Experiencing the natural environment

SECTION 3 – INCOME AND EXPENDITURE

Q13 What was your organisation's gross income for each of the past three years?

Year	Income (£)
2008	
2009	
2010	

Q14 How much of the above was comprised of (%)

	2008	2009	2010
Entrance fees			
Grants			
Legacies or similar			
Sales			
Car parking			
Events			
Other (please specify)			

Q15 Apart from the above sources of income, does your organisation have opportunities to generate revenue in the following areas?

Area	Please Tick
Donations/legacies	
Car park charges	
Retail	
Café	
Entrance fees	
Corporate functions	
Room hire	
Events	
Voucher schemes	

Q16 What recent initiatives has your organisation undertaken to increase revenue and enhance the visitor experience?

Q17 For those activities within your organisation relating to the historic environment, please provide details of your operating and capital expenditure costs in the past three years

	2008 (£)	2009 (£)	2010 (£)
Operating and maintenance costs			
Capital expenditure costs			

Q18 How much of the above was comprised of (%)

	2008 (%)	2009 (%)	2010(%)
Salaries			
Purchases			
Maintenance			
Major improvement works			
Other (please specify if possible)			

Q19 What proportion (%) of expenditure in each of the above categories was paid to suppliers/employees resident in Northern Ireland?

Q20 If you have not undertaking any capital expenditure in the last 3 years what is the reason for this?

Reason	Please Tick
Not the responsibility of your organisation	
No need was identified	
No funding	
Other (please specify)	

Q21 Are there any plans to make any capital expenditure in the next 2 years?

- Yes – please provide details if possible (£, purpose)
- No (with reasons why not)

SECTION 4 – EMPLOYMENT

Q22 How many permanent and seasonal Full-Time Equivalent (FTE) employees does your organisation have in each key area of historic environment activity in 2010?

	Permanent FTE	**Seasonal FTE**
Listed/historic buildings		
Archaeology		
Conservation areas		
Gardens/designed landscapes		
Historic landscapes		
Marine historic environment		
Natural environment		
Technical expert staff		
Administrative staff		

Q23 What proportion (%) of the FTE employees above are residents of Northern Ireland?

	Proportion (%)
Permanent FTE	
Seasonal FTE	

Q24 What is the extent of volunteer input to the delivery of the organisation's functions? (hours per week/month/year or expressed as a percentage of overall hours worked)

SECTION 5 – MARKETING

Q25 What marketing approaches do you use to promote the sites and/or activities you are responsible for? (Select all that apply)

Approach	**Please tick**
Internet – own website	
Internet – other websites	
Internet – social media	
Printed brochures	
Stands at festivals / tourism fairs	
TV/Radio	
Direct mail	
Other	
Do not do any direct marketing	

Q26 Who is/are your target group(s) for marketing ?

Group	**Please tick**
Geographical markets	
Visitor type	

Q27 Do you collaborate with any of the following for promoting visits to historic environment site(s) you are responsible for?

	Please Tick
Central government	
Local government	
Community groups	
Tourism companies	
Partners in the rest of the UK	
Partners in the Republic of Ireland	

Q28 How often does your organisation interact with partners as part of the collaboration above?

Q29 What benefits have you observed for your organisation from collaborating with other partners?

SECTION 6 – WIDER SOCIAL IMPACTS

Q30 Do you think the site(s) your organisation is responsible for delivers wider benefits than just to those who visit the site(s) (e.g. community groups, school groups, volunteering programmes)?

- Yes
  - Local residents
  - All of Northern Ireland
  - All of the UK
  - All of Europe
  - Global population
- No – our site(s) provide(s) benefits to visitors alone

Q31 [If yes to the above question] in your opinion, what kinds of wider benefits do both visitors and non-visitors receive?

Benefit	**Please tick**
A sense of identity and history	
Heritage for future generation	
A nicer environment to live in	
Economic regeneration encouraged by heritage conservation / renovation (such as increased tourism income, employment etc.)	
Reduced crime and vandalism encouraged by heritage conservation / renovation	
Knowledge that those less advantaged in society have access to public heritage sites	

Q32 Do you take any particular actions to increase the wider benefits received by those other than visitors to your organisation's sites?

- Yes (please specify)
- No (please specify why not)

Annex 3: Case Study Summaries

<table>
<tr><td colspan="2">Causeway Coastal Route (including Dunluce and Carrickfergus Castles)</td></tr>
<tr><td colspan="2">Project Benefits</td></tr>
<tr><td>Economic</td><td>The DETI NI Visitor Attraction Survey Jan-Dec 2010 identified that :

• The Giant's Causeway and Antrim Coast and Glens attracts the highest level of visitation reported against any of the NITB Signature Projects;
• Visitors were primarily visitors from Great Britain (35%); from North America (23%); European (15%); the Republic of Ireland (9%) and Northern Ireland (5%); and
• These visitors are general sightseers and culturalists who enjoyed the unique and distinctive landscapes and coast (84%), unique and distinctive attractions (53%), with 82% having visited a castle, house or historic monument; and
• Attributes identified in relation to the actual experience were: memorable (75%); natural (75%); unique (52%); historical (49%); inspiring (47%); adventurous (41%); and authentic (35%).

According to NITB's "Local Authority (LA) Tourism Estimates", there were 870,100 visitors/trips, 2,944,600 visitor nights and £141.5m spent in the Causeway Coast and Glens region (which is comprised of eight local authority areas), representing 28% of visitors, nights and spend of the total reported for NI in 2009. Visitor numbers and estimated revenue associated with key historic buildings/sites are as follows:

<table>
<tr><th></th><th>2010 Visitor Numbers</th><th>Estimated 2010 Visitor Revenue</th></tr>
<tr><td>Giant's Causeway & Visitor Centre</td><td>464,195</td><td>£696,293</td></tr>
<tr><td>Carrick-a-Rede Rope Bridge</td><td>238,227</td><td>£1,115,379</td></tr>
<tr><td>Carrickfergus Castle</td><td>69,792</td><td>£173,782</td></tr>
<tr><td>Downhill Demesne & Mussenden Temple</td><td>23,494</td><td>£87,750</td></tr>
<tr><td>Dunluce Castle</td><td>10,526</td><td>£13,894</td></tr>
<tr><td>Glenarm Castle & Walled Garden</td><td>12,000</td><td>£44,820</td></tr>
</table>

Other economic benefits generated by heritage conservation include: employment and provision of training/development opportunities</td></tr>
<tr><td>Social</td><td>• Contribution to a sense of identity and history
• Improved environment/ contribution to well being
• Reduced crime and vandalism
• Ensuring wider access to public heritage sites (e.g. for those from socio economically deprived communities)</td></tr>
<tr><td>Other</td><td>• Protecting heritage for future generation</td></tr>
<tr><td colspan="2">Key Issues/Challenges
• Extensive range of sites, representing various stages of development</td></tr>
</table>

Causeway Coastal Route (including Dunluce and Carrickfergus Castles)
• Financial viability /sustainability of key assets
Recommendations
In order to maximise the benefits associated with the historic environment along the Causeway Coastal Route, consideration should be given to: • **Increasing awareness** (e.g. promotion of Causeway Coastal Route and its historic assets through all distribution/information channels; increasing awareness of other key attractions along the route beyond Giant's Causeway; identifying sites/attractions in need of 'upgrade/refreshment'); • **Developing/enhancing 'connections' between assets located along the route** (e.g. developing self-drive touring opportunities offered by Causeway Coastal Route by integrating fully with Walled City and Belfast); • **Further develop environmental aspects of the experience** (e.g. development of maritime heritage opportunities; develop distinctive open air entertainment); • **Enhancing the effectiveness of brand messages** i.e. ensuring delivery against the significant perception of the uniqueness and authenticity of the experience; identifying opportunities to deliver this through uncovering stories; and developing interpretation to maximise the opportunities for uncovering stories and learning; and • **Encourage higher spend by visitors** (e.g. package/cluster product around eating/retail/culture experiences; demonstration and sales opportunities for local craft providers; and branded souvenirs and identifying opportunities to sell in the area).

St Patrick's Heritage	
Project Benefits	
Economic	St Patrick Trail represents various sites/assets spread across a number of local Council areas. A number of key sites attract significant visitor numbers (e.g. St Patrick CoI Cathedral, St Patrick Trian Visitor Centre, Down Cathedral & St Patricks Grave, Down County Museum and The Saint Patrick Centre). Key areas of economic benefit include: • Visitor expenditure • Employment creation • Increased footfall in destination areas/generating expenditure in some local businesses The estimated impact of Down County Museum alone is: c£800,000 per annum (Gross) visitor spend; £150,000 (direct and indirect) expenditure on goods and services; and direct & indirect/induced employment of c19 FTE staff. The estimated quantum of visitor impact at the Saint Patrick Centre is c£800,000.
Social	• Activities facilitated by specific sites contribute to development of social cohesion (e.g. Reconciliation Education Programme for young people and community tours aimed at reconciliation based at the Saint Patrick Centre) • Contribution to sense of identity/place • Contribution to civic pride and well-being
Other	• Conservation of historical buildings/monuments
Key Issues/Challenges • Extensive range of sites, representing various stages of development • Financial viability /sustainability of key assets	
Recommendations	
• Investment in trail development (e.g. physical improvements, interpretative information, signposting, furth investment into archaeology excavation is required at various sites)	

St Patrick's Heritage

- Co-ordinated marketing, promotion and product development
- Investment in improved/standardised visitor monitoring systems/processes
- Improved partnership working/partnership development in particular (between key stakeholders in Northern Ireland and with Republic of Ireland stakeholders)

Key Issues/Challenges

- Extensive range of sites, representing various stages of development
- Financial viability /sustainability of key assets

Recommendations

In order to maximise the benefits associated with the historic environment along the Causeway Coastal Route, consideration should be given to:

- **Increasing awareness** (e.g. promotion of Causeway Coastal Route and its historic assets through all distribution/information channels; increasing awareness of other key attractions along the route beyond Giant's Causeway; identifying sites/attractions in need of 'upgrade/refreshment');
- **Developing/enhancing 'connections' between assets located along the route** (e.g. developing self-drive touring opportunities offered by Causeway Coastal Route by integrating fully with Walled City and Belfast);
- **Further develop environmental aspects of the experience** (e.g. development of maritime heritage opportunities; develop distinctive open air entertainment);
- **Enhancing the effectiveness of brand messages** i.e. ensuring delivery against the significant perception of the uniqueness and authenticity of the experience; identifying opportunities to deliver this through uncovering stories; and developing interpretation to maximise the opportunities for uncovering stories and learning; and
- **Encourage higher spend by visitors** (e.g. package/cluster product around eating/retail/culture experiences; demonstration and sales opportunities for local craft providers; and branded souvenirs and identifying opportunities to sell in the area).

Derry City Walls and Ebrington Barracks

Project Benefits

Economic	**Derry City Walls** In 2010, the combined number of visitors to the main historic assets was at least 192,312. Three of the six heritage buildings are still undergoing restoration. The majority do not charge an entry fee, those who do, only charge a nominal amount. The three restored buildings provide employment for approximately 19 FTE staff. NI's Visitor Attraction Survey highlights that Derry's City Walls represent a significant tourism offering, with 248,340 visitors in 2010 (including day trippers), representing a 10% increase of the previous year and a 31% increase from 2005 figures. A Visitor Attraction Survey carried out in Jan-Dec 2010, identified that 31% of visitors to the Walled City were from GB; 26% of visitors were from North America; 17% from Europe; 14% from Rest of World; and the lowest proportion of visitors were from NI/RoI (12%) and that history/heritage, scenery and opportunity to learn were the most appealing aspects of the visit to the area. It is anticipated that the City's Walled Lighting Strategy will enhance the evening economy. **Ebrington Barracks Project** Creating active use of buildings located on the site.

Derry City Walls and Ebrington Barracks	
	Potential to create employment and training/development opportunities.
Social	**Creating Safer Spaces** - It is anticipated that the **Walled City's Lighting Strategy** will contribute to a safer environment. **Contributing to Social Cohesion** - The development of **Ebrington** will utilise heritage to redevelop an urban site to enhance links with the local community and neighbouring communities in a 'shared space', which will be further enhanced by the Peace Bridge, which connects Ebrington with the City centre. **Celebrating Culture & Heritage** – the restoration of historic buildings within the City to bring them back into active use as tourism offerings, has the potential to increase the public's understanding and appreciation of the City's history and of a shared heritage. **Changing Perceptions and Increasing Civic Pride** – promotion of the City Walls, Peace Bridge and Ebrington Barracks as a combined tourism product (i.e. creating links and synergies between the various built heritage sites across the City) offers the potential to change perceptions within and outside the City, thereby increasing the potential for further tourism and business investment in the area.
Other	Derry City Walls – Conservation/protection of six historical buildings Ebrington Barracks Project – Conservation/protection of 14 listed buildings
Key Issues/Challenges In 2012, the Built Heritage Programme and restoration of some of the buildings within Ebrington will be completed. This coupled with the newly erected Peace Bridge collectively offers an enhanced tourism product with the potential to generate income, employment and private sector investment from tourism/cultural events associated with the UK City of Culture 2013 and other events such as the Clipper Yacht Race and the All-Ireland Fleadh. A key challenge associated with this activity will be in ensuring that the benefits derived flow to all parts of the city, particularly those with high levels of social and economic deprivation, and that activities/benefits are sustained beyond the life of the events.	
Recommendations	
• Introduce trading on the City Walls for local craft businesses, to increase activity around/use of the Walls and further develop the evening economy. This will be enhanced by the City's Walled Lighting Strategy; • Develop a co-ordinated approach to marketing built heritage sites within the City Walls and Ebrington to link the heritage sites to enhance visitor numbers, experience and spend; • Maintain links with the Irish Walled Town Network and International Walled Towns Friendship Circle, to ensure that local and international best practice is reflected in the development and promotion of the Walled City.	

Armagh City (including the Navan Centre)	
Project Benefits	
Economic	The Navan Centre is an interpretative centre located alongside a major prehistoric hilltop earthwork. The centre is owned by Armagh City and District Council and attracts 40,000 visitors per year. The centre also includes a café, audio visual facility and a re-created Iron Age compound with tours that are popular with schools. The centre is supported by the District Council, but its revenue is supported by a modest fee and income from the café. It serves an important educational facility and attractions for domestic and international visitors to the County and City of Armagh. Most notably these include the two cathedrals of the "Ecclesiastical Capital" of Ireland, the Armagh Planetarium and St Patrick's Trian. Direct revenue from entrance fees to the main county attractions is in

Armagh City (including the Navan Centre)	
	excess of £500,000 per annum with the total visitor economic contribution estimated at over £35 million.
Social	The Navan Centre acts as an important cultural and educational resource in informing people of Ireland's Celtic and mythological past and introducing school children to the ways of life in Iron Age times. In this respect, it complements the social and cultural contribution of St. Patrick's Trian and the two cathedrals which inform and link people to Ireland's Christian heritage. Likewise the Armagh Observatory and Planetarium, the only such facility in Ireland, is an educational resource that attracts large numbers of people to the county. Armagh Public Library, No.5 Vicar's Hill and the county's various museums also serve as educational resources. The Palace Demesne and Stables is both a historical and recreational resource that attracts very considerable use from the resident community while the two National Trust properties at the Argory and Andress House are also major destinations of historical and amenity value. Armagh has a rich history, but also a troubled recent past. Its built heritage is a cultural resource for all people in the city. The community's engagement with this heritage, for example through recent consultation process on the re-use of the historic Armagh Gaol is helping in the city's social and cultural recovery.
Key Issues/Challenges Its appearance of the city is run-down in places compounded, in places, by a juxtaposition of inappropriate architecture and business activity. The rich mix of historic features together with the proximity to attractive countryside of high recreational values provides potential to further develop the tourism sector and to attract investment.	

Lough Erne and Fermanagh	
Project Benefits	
Economic	Lough Erne is a well established tourist destination in view of its natural and historical heritage, appealing to water related recreation but also coach tours. The principal destination is the Lough itself, although Belleek Pottery attracts around 250,000 visitors each year and Marble Arch Caves around 70,000. Both attractions have a cultural and historical association. The wider area, including Enniskillen contains numerous sites from the pre-historic, early Christian and Plantation periods. All these destinations account for over 620,000 visits, and while the total number of visitors to historic heritage may be lower due to visits to more than one site, the complementary nature of many sites makes for a major tourism and economic resource.
Social	The numerous historic sites within the county are a major asset of social and cultural value to the people of Northern Ireland, especially in terms of the early historical significance. That the value of these sites is also realised internationally through the attraction of so many tourists, is also a source of pride for Fermanagh. Enniskillen Castle has worked hard to become an educational centre for all ages. The historic heritage is fully complementary to the draw of the county's natural attractions, a relationship captured very effectively at Castle Archdale which attracts over 180,000 visitors each year.
Key issues and Challenges Fermanagh's attraction as a tourist destination resides in its natural heritage and specific habitual or honey pot destinations. The challenge is to ensure that visitors are not confined to these locations, but appreciate the varied wider historic and natural environment. There is a need too to continue to strengthen the public's own relationship with this heritage.	

Belfast Cathedral Quarter	
Project Benefits	
Economic	• Creating an economically active use of derelict/unused buildings, thereby contributing to job creation, workforce training/development and facilitating increased level of visitor expenditure within the City • Contributing to the City's leisure and tourism infrastructure
Social	• Increased residential provision within the City Centre • Contributing to the development of the arts/culture sector within the city • Contributing to sense of identity, shared history and civic pride • Contributing to improved community relations • Contributing to increased volunteering opportunities • Potential to contribute to a reduction in youth crime
Other	• Provide a focal point for urban regeneration • Conservation of historic buildings
Key Issues/Challenges • Economic, social and environmental sustainability	
Recommendations	
Pursue the development of updated Masterplan for the area, so that future development can be planned on an area wide basis, thereby maximising the potential for economic, social and environmental sustainability to be achieved.	

Belmont Tower	
Project Benefits	
Economic	• In 2010, over £71,000 of income was generated from the use of Belmont Tower (e.g. meetings, events etc.). In 2011, income from these sources had reduced to circa £44,000 • Created/sustains 1 full time job (office manager) and 3 part-time positions (caretaking staff) • Increases footfall in the area (circa 60,000 visitors to the venue per annum), thereby contributing to sustainability of other businesses
Social	• Supported by c30 volunteers per annum • Provides a venue for community/voluntary sector meetings/activities • Contributes to civic pride and well being
Other	• Conserves and make active use of an historic building • Promotes local literary heritage • Complements public sector strategies aimed at developing literary tourism/ heritage • Provides skills development and volunteering opportunities
Key Issues/Challenges • Future sustainability – corporate and repeat bookings have declined during the economic recession • Future opportunities – creation of linkages with forthcoming tourism events/initiatives	
Recommendations	
• Further diversification of activities/events held at Belmont Tower • Future development of PR/marketing and partnerships/collaborations via forthcoming events (e.g. those associated with the Titanic Centenary (2012), Belfast Book Festival and other Literary Tourism initiatives).	