

Study of the Economic Value of Northern Ireland's Historic Environment

Full Report

Overheard at the Belfast Welcome Centre

Interviewer: **“Please select from the list on this card the main reason how you decide to choose which foreign country to visit”**

A young Canadian couple in unison: **“History”**

21st September 2011

Lead authors:

Declan Mackin and Alan Davidson (RSM McClure Watters) Economic impacts and case studies

Craig Bullock (eftec) Conceptual review, social values and case studies

Researchers:

Sarah McCarthy (RSM McClure Watters),
Lawrie Harper Simmonds (eftec) and Zara Phang (eftec)

Editor:

Ece Ozdemiroglu (eftec)

Acknowledgements

The authors would like to thank the members of the Economics Sub-group of the Historic Environmental Ministerial Strategic Forum, namely: Dr Brian Williams (Department of the Environment, DOE), Michael Coulter (DOE), Bernard Moane (DOE), Stephen Aston (Northern Ireland Environment Agency), Pamela Wilson (Northern Ireland Tourist Board), Patrick Neeson (Department of Culture Arts and Leisure), Paul Mullan (Heritage Lottery Fund), Stephen Duffy (Department for Social Development), Diane Ruddock (National Trust) and Professor Gabriel Cooney (University College Dublin) for their guidance and comments; to many organisations who have participated in the impact assessment survey and to many organisations and individuals who have provided valuable views and information for the case studies. Any remaining errors are ours.

eftec
73-75 Mortimer Street
London W1W 7SQ
www.eftec.co.uk
44(0) 207 580 5383

RSM McClure Watters
Number One, Lanyon Quay
Belfast BT1 3LG
www.rsmmcw.com
44(0) 28 9023 4343

eftec offsets its carbon emissions through a biodiversity-friendly voluntary offset purchased from the World Land Trust (<http://www.carbonbalanced.org/>), and only prints on 100% recycled paper.

Table of Contents

1. Introduction and Background	1
1.1 Project Overview.....	1
1.2 Overview of NIs Historic Environment and the Wider Strategic Context..	2
1.3 Our Approach and Report Structure	3
2. An Overview of the Value Concept used in this Study.....	5
2.1 Total Economic Value	5
2.2 Understanding the Economic Value of the Historic Environment.....	7
3. Economic Impacts of Northern Ireland’s Historic Environment	14
3.1 Our Approach	14
3.2 Stakeholder Survey – design and implementation.....	15
3.3 Stakeholder Survey – summary results	16
3.4 Direct Economic Impacts – Quantitative Analysis.....	19
3.5 Gross and Net Direct Impacts - outputs.....	27
3.6 Net Direct Impacts - employment.....	30
3.7 Net Direct Impacts – Gross Value Added	30
3.8 Total Impacts – Gross Value Added	31
3.9 Public / private sector spending	32
3.10 Impact of Domestic Tourism.....	33
4. Case Studies	36
5. Conclusions and Recommendations	40
5.1 The economic impacts and employment opportunities	40
5.2 Wider Economic (Social) Benefits.....	43
5.3 Recommendations.....	44
Annex 1: Principles of the economic value of the historic environment.....	49
Annex 2: Stakeholder Survey	54
Annex 3: Case Study Summaries	63

1. Introduction and Background

1.1 Project Overview

In 2011, the Department of Environment Northern Ireland (DOE NI) commissioned eftec (Economics for the Environment Consultancy) and RSM McClure Watters to carry out a “*Study of the Economic Value of Northern Ireland's Historic Heritage*”.

The Terms of Reference for this study define ‘historic environment’ as:

“the state care monuments, scheduled monuments, historic parks, gardens, demesnes, buildings and structures of historic value, and archaeological sites of significance that exist in Northern Ireland”. This includes the coastal waters surrounding Northern Ireland in addition to the terrestrial features”.

This definition is a narrow one concentrating on the built heritage (excluding landscapes and biodiversity) and determines the scope of the study.

The aim of the study is, through quantitative economic research and a range of qualitative examples, to demonstrate the full economic and social importance of the historic environment to local communities and to Northern Ireland as a whole. The four objectives of the study are to:

1. Determine the current value of economic activity generated by Northern Ireland's historic environment and its distribution;
2. Gauge the level of historic environment-related employment in Northern Ireland, including indirect employment, the distribution of this employment, and its relative importance compared with other sectors;
3. Conduct a credible analysis of the wider community benefits that Northern Ireland's historical environment provides to the economy using a series of case studies, and
4. Make an assessment of the potential for the use of Northern Ireland's historic environment to aid sustainable growth of the economy and make recommendations as to how this could be realised.

The purpose is to help make the case for investment in the Northern Ireland historic environment. In order to achieve this purpose, the study gathered evidence on the economic value in its broadest definition. This includes the kind of value captured by / expressed in actual markets (e.g. through visitor spending) and the kind of value that is not (wider social benefits or non-market economic values). Both of these values are important and need to be identified for the decision making process even if not completely quantified.

The study also estimated the jobs supported by and income and expenditure directly and indirectly related to the historic environment.

1.2 Overview of NIs Historic Environment and the Wider Strategic Context

As well as being indispensable to the study of history and archaeology, the historic thread of our environment is vital to our understanding of place. It enhances our sense of well-being and provides a setting for a great variety of local activities. It represents significant past investment of physical, natural and intellectual resources and offers the potential to realise significant economic, social and environmental benefits.

NI's historic environment forms the basis of much of the region's tourism infrastructure and the Northern Ireland Tourist Board (NITB) has identified a number of 'signature projects' that offer the best potential for tourism growth. These include the Causeway Coast and Glens (partly historic), St. Patrick and Christian Heritage; the Titanic and Maritime Belfast and the Walled City of Derry.

Current Government policy highlights the importance of tourism to the local economy, for example:

- **The NI Executive's Draft Programme for Government (PfG) 2011-2015** identifies the strategic priorities against which public spending is allocated in NI. These priorities include "*Growing a Sustainable Economy and Investing in the Future*". Under this priority, the Executive has made a commitment to: "*Increase visitor numbers to 3.6 million and tourist revenue to £625 million by 2013*";
- The NI Executive's Draft Economic Strategy (November 2011) recognises that the NI economy is over dependent on the public sector and that the economy needs to be rebalanced by growing the private sector. The Draft Strategy identifies a number of 'rebalancing' measures, including: increasing visitor numbers (as identified above); and supporting projects that improve competitiveness, encourage diversification of the rural economy, improve quality of life in rural areas and that protect and enhance the environment;
- The **Draft Tourism Strategy for Northern Ireland to 2020** (February 2010) identifies a number of 'key areas of focus', namely:
 - Earning more from visitors;
 - Investing in development - both capital projects and business skills;
 - Targeted marketing;
 - Policy support from government and its agencies; and
 - Industry leadership.

It also identifies that in the immediate future, the NITB's priority market segments will include 'culture/experience seekers'.

Key priorities identified within the Draft Tourism Strategy include, but are not limited to:

- “Complete the development of the 5 Signature Projects and develop them into Signature Destinations”
- “Demonstrate commitment to taking care of the environment”;
- “Upgrade interpretation at visitor sites and give priority to the development of projects that explain our history and culture”
- “Achieve cross government commitment to supporting economic growth through tourism”

Key actions identified by the Draft Strategy include:

- “Invest in visitor information to encourage visitors to treat the environment as a precious resource”;
- “Conserve and enhance the natural and historic environment”; and
- “Give priority for financial support to projects that add to a visitors understanding”.

Given its contribution to NI's tourism infrastructure, it is likely that achievement of the objectives associated with the above strategies will require further development and sustainable management of assets associated with the region's historic environment.

1.3 Our Approach and Report Structure

Our approach to the study has incorporated the following:

- **A stakeholder survey:** Online survey of key organisations and stakeholders operating in historic environment sector that took place between in September – October 2011 and again with additional organisations in January – February 2012. The survey contained questions on the organisations' core activities, staffing, expenditures, income associated with historic environment related activities, visitor numbers and respondents' views on the wider benefits.

19 responses were received out of 88 organisations contacted: a response rate of 21.6% including incomplete returns. This is a low response rate for surveys like this. However, the returns also included incomplete responses (e.g. organisations reporting that they don't record visitor numbers). Therefore, where Northern Ireland specific information was missing or not sufficiently detailed/ representative, we used proxies from Scotland, Wales and the Republic of Ireland for which similar studies were conducted in recent years (Ecotec, 2008 and 2010 and Ecorys, 2012). However, the results of the survey did produce some useful information regarding overall trends in activity and qualitative aspects of performance.

- **Quantitative analysis:** in addition to the survey results, we also reviewed the relevant literature to estimate the impacts generated by historic environment within wider economy (e.g. out-of-state tourism and construction sectors) to estimate net output (expenditure), employment, Gross Value Added, multiplier effects and the leverage effect of public spending in encouraging private spending. The impact of leisure day visits by Northern Ireland residents is also estimated; and
- **Qualitative analysis:** We undertook seven detailed case studies illustrating the impact of historic environment across a range of wider benefits. Responses for the stakeholder survey are also used in the qualitative analysis of the social benefits.

The approach applied to this study is consistent with methodology for similar recent studies in Scotland (2008), Wales (2010) and Republic of Ireland (2012).

The report consists of five sections. Following this introduction:

- Section 2 provides an overview of the economic value concept used in this study;
- Section 3 presents the economic (market) impact model used in this study and the associated results;
- Section 4 presents a selection of case studies. A summary of the case studies is presented in Annex 3, while individual reports are available in separate files; and
- Section 5 concludes with the study's recommendations.

In addition, the document has three Annexes:

- Annex 1 presents further detail on the principles of economic analysis underlying our approach which can be referred to by interested readers but is not essential reading;
- Annex 2 presents the questionnaire used in the stakeholder survey; and
- Annex 3 presents summaries of case studies developed as part of the study.

There is also a stand-alone summary report that covers the same ground but focuses on key messages.

2. An Overview of the Value Concept used in this Study

Much of Northern Ireland's historic environment consists of landmark heritage that, in its own right, will attract domestic and international tourism with all the associated expenditure and employment gains this sector provides. Many of its historic buildings require conservation and maintenance or are available for modified or new uses that require buildings works with the stimulus this provides to the construction sector. These economic impacts of the historic environment itself and its effect on other sectors are explored in Section 3 of this report.

Social and cultural benefits often tend to be viewed as an add-on or placed under the heading of "wider benefits". In principle, many of the social and cultural values are also economic values, as anything that adds to people's well-being is positive irrespective of whether a financial transaction takes place. In fact, even without a market, some of these wider benefits can be quantified through specially developed methodologies.

In this Section, we provide an overview of the broad definition of economic value and illustrate how it applies to the historic environment in Northern Ireland. Annex 1 provides further economic theory behind the analysis here, which is presented for the benefit of the interested reader but is not essential reading in this context.

2.1 Total Economic Value

The value concept used in this study is what is called "the total economic value" in the economic literature. This is a typology of why individuals hold values for any given good, service or resource, including the historic environment.

Individuals hold values for historic environment because they make direct use of it by visiting the sites for tourism; access and learning; and volunteering at the sites. This value component is referred to as *direct use value* in the economic literature and can be quantified by looking at how much money and time people spend to visit the historic environment and hence create tangible *economic impact*. This economic impact is what we measured through the stakeholder survey and quantitative analysis (Section 3).

Individuals hold values for historic environment not only because they visit specific sites, but because the existence of the sites contributes to other economic activities and social values. This value component is referred to as *indirect use value* in the economic literature. The impacts of the historic environment on other economic sectors can be quantified based on data from actual markets. In this study, it has been valued by reviewing data from other sectors as part of the quantitative analysis (see Section 3). Other indirect use values such as skills attainment, sense of place, community cohesion,

vitality and social interaction, and environmental quality are very difficult to quantify. In this study, we provide qualitative assessments of these through case studies.

Individuals also hold values for the historic environment that can be translated into a 'willingness to conserve' in order to use the historic environment in the future. This value component is referred to as *option value* in the economic literature. This value is undoubtedly reflected in investments made in the conservation of the historic environment but extremely difficult (some may argue not necessary) to disaggregate.

Finally, individuals hold values for the historic environment irrespective of what uses they make of it now or in the future. These are called *non-use values* in the economic literature and could arise because individuals may value others' use of the historic environment (altruistic value), may wish future generations to benefit (bequest value) or believe that historic environment should be conserved for its own sake (existence values). It is not possible to quantify this type of value without primary research using specially designed methods. Therefore, in this study, they are covered in qualitative terms.

Figure 2.1 summarises the components of the Total Economic Value terminology and show how the approach of this study covers these.

Figure 2.1: Total Economic Value and Coverage by our Approach

Use values			Non-use values			
Direct use	Indirect use		Option value	Altruistic values	Bequest values	Existence values
Visits Tourism Access and learning Volunteers	Regeneration Catalyst for investment	Skills attainment Sense of place / identity / pride Community cohesion Vitality and social interaction Environmental quality	Re-use or adaptation of buildings Future signature projects Future tourism potential	Benefits to others in the community	Bequeath of heritage	For the sake of the historic environment existing
Stakeholder survey						
Quantitative analysis (economic impacts)		Qualitative analysis by way of case studies				

Note: At least some part of option value may be reflected in the quantitative analysis but this is not possible to disaggregate.

Familiar market values such as the returns from visitor entrance fees and tourism expenditure in the local and national economy are analysed to quantify the use values. The impacts of historic environment related spending on the construction sector and the investment in the regeneration of historic districts or the re-use of heritage buildings are analysed to quantify indirect use values.

All types of value are of course related. The social and cultural values are generally the drivers for expenditure and investment which provide tangible economic benefits to various economic sectors, including tourism and construction. Such economic benefits, in turn, ensure the conservation of the historic environment and hence sustain social and cultural benefits. Figure 2.2 shows how heritage conservation can provide for social and cultural benefits that attract and justify mutually re-enforcing public and private investment in local regeneration and development, in turn attracting tourism and consumer spending.

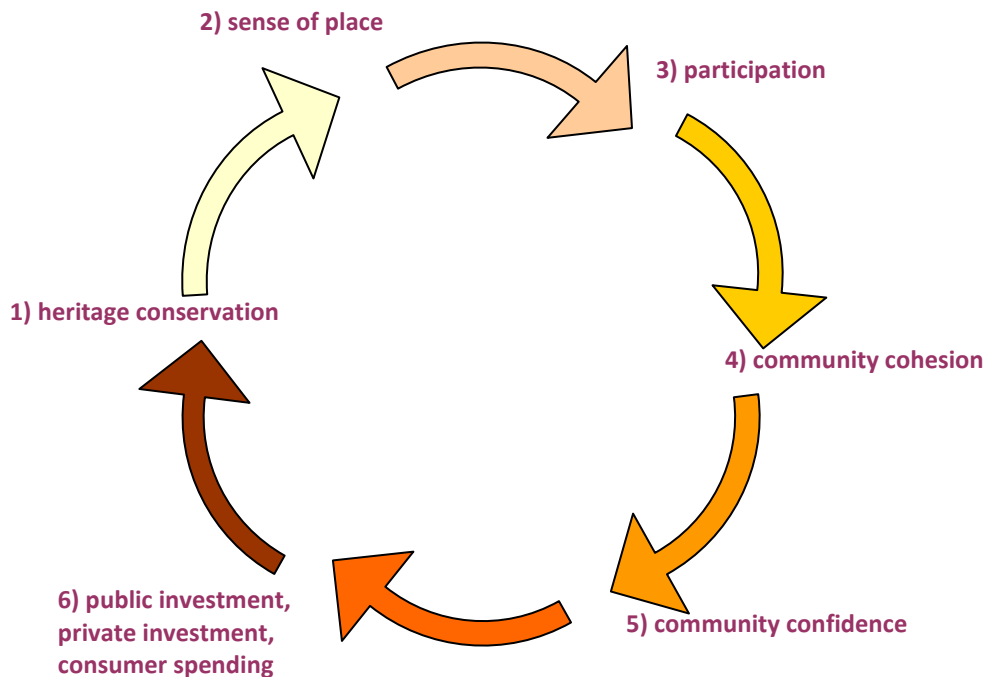


Figure 2.2: The relationship between wider economic, social and cultural benefits, investment and tourism

2.2 Understanding the Economic Value of the Historic Environment

In this Section, we provide further details on key value components as they relate to the historic environment in general and in the specific context of Northern Ireland. The examples provided in the boxes are for illustration only and are not meant to be comprehensive. Further details are provided in the quantitative analysis and case studies.

Visits / Tourism. Landmark historic sites and buildings are an obvious draw for both domestic and international tourists to Northern Ireland. Compared with other economic sectors, tourism is relatively labour intensive and provides a market for numerous inputs and services such as local food produce, crafts, entertainment or transport. Tourism can

provide an argument for urban renewal, and for public and private investment. It is also effective in raising the profile of Northern Ireland abroad.

Surveys have demonstrated that, when asked about where they would most prefer to spend a day out, people regularly list towns and cities known for their heritage and that a strong correlation exists between people's ratings and the number of listed buildings.¹ People, it seems, like visiting towns with a distinct heritage character, particularly where this can also accommodate retail and leisure activity.²

Top historic attractions include the Botanic Gardens in Belfast (689,000 visitors), Derry City Walls (248,000), the Carrick-a-Rede Rope Bridge (238,000) and Mount Stewart House (150,000) (NITB, 2010). Often there is a correspondence with the natural environment through the landscape setting and the influence that human beings have had on this landscape, for example through farming or settlement.

Access and learning. People are encouraged to learn more about their history and community, especially where restoration provides an opportunity for access, amenity and interaction. There are opportunities for interpretive facilities and for relationships to be developed with schools and colleges. Moreover, there are opportunities to link with historical associations and trusts and to provide for life-long and extra-curricula learning.

The interest and value of sites of archaeological interest can be difficult to communicate, but at the Navan Centre in County Armagh visitors have the opportunity to be taken on guided tours of the earthworks and to experience an interpretive exhibition that takes them on a tour of Ireland's Celtic history and myths. An early Christian hut has been re-created and guides, who take on the clothing and persona of characters who may once have lived at the site, introduce visitors to the daily life of the time. The tours and displays are appealing to families and programmes are linked to the national curriculum. In the nearby City of Armagh, the Observatory is keen to promote its cultural and educational value to a wider public while, at the historic Armagh Public Library, visitors, including children, are permitted to pick up and open many of the rare and antique books in the collection. Some other good examples of heritage's contribution to education can be found in the Annalong Corn Mill and Enniskillen Castle. Each September, throughout Northern Ireland, public and privately owned historic buildings open their doors to the public on the European Heritage Open Day.

Volunteering. The process of volunteering provides rewards to the individuals involved, both personally and in the sense of contributing to their community. Volunteer work on historic properties can also provide useful practical skills.

¹ For example, the North West Regional Development Agency's on-line panel of 35,000 people.

² English Heritage (2010). Thanks also to David Geddes of Colliers International for personal communication.

Huge numbers of people volunteer to be involved in the running or maintenance of historic features. The National Trust in Northern Ireland has a database of 4,500 conservation volunteers who they believe contribute 80,000 hours of their own time each year. This is a very real investment by those involved as time is valuable. While much volunteering may be performed by retired people or by others at weekends, all time has an opportunity costs in that it can be spent doing other things. If this time contribution is valued at just the minimum wage it would be worth £486,000 per year. This is just a modest reflection of the personal value that most volunteers themselves place on heritage.

Regeneration. Regeneration is often centred on iconic buildings of heritage value. The integration of these buildings into urban design or their adaptation for new uses can provide a focus for improving the environment in which people choose to live and work. The enhanced image of an area encourages the privately funded renewal of private and commercial buildings with benefits to the local economy. There are also income and employment benefits for the construction sector.

For many of these reasons, towns and cities with heritage assets have a competitive advantage. The European Commission report 'Imagination and Regeneration' (Landry, 2003) observes that urban competitiveness has been an objective behind much of the infrastructural investment and marketing that cities have used to promote themselves in recent decades. The report argues that in this competitive environment distinctiveness is a unique asset and that culture is a means to publicise a city's identity. It adds that urban regeneration fuelled by a creative culture presents a progressive and "can-do" image. With heritage assets' integration into the public realm, and with public investment demonstrating government commitment, an impression is created of a community that is going places.

The Cathedral Quarter in Belfast and the Regeneration Plan for Derry-Londonderry demonstrate how the historic environment can become a resource for urban regeneration. In Derry-Londonderry, over £14 million has been invested in restoration within the "Walled City" including the historic Guildhall. The City Centre is linked by a new Peace Bridge to Ebrington Barracks, a star-shaped former military base with an imposing setting beside Lough Foyle. Development plans for Ebrington aim to transform it into an arts and culture centre and a home for creative and other start-up companies, cafes, bars and restaurants at a cost of £23 million. These projects, bolstered the city's successful bid to become the UK City of Culture in 2013, will draw on the City's heritage to strengthen its international reputation and to provide a springboard for economic and social development.

Catalyst for investment. The historic environment can stimulate investment through the re-use of buildings for new purposes, for example for tourism as landmark hotels, residential development, office space and enterprise centres, or as gateways or

identifiers for particular neighbourhoods. Naturally, in each case depending on the character and original use of the building, a balance must be struck between the opportunity provided to protect external heritage features and allowing a varying degree of public access. Where supported by a public commitment to an area, the positive image presented to visitors and outsiders portrays a forward looking and confident community and an attractive environment for investment. There are potentially very significant benefits for the construction and tourism sectors and to the local and wider economies.

The Merchant Hotel in Belfast is an elaborate blend of Victorian architecture and Art Deco design. The presence of such a famous structure amongst other examples of superb historic architecture in Belfast's Cathedral Quarter, provides a rationale and stimulus for public and private investment in the district. Nearby, McHugh's Bar and Restaurant is housed in the oldest building in Belfast. Private investment has permitted the building to resume its Georgian splendour as a Grade A listed building. St. George's Market was restored with Heritage Lottery Funds following a vigorous campaign by traders and local people. It continues to provide a popular public space and fashionable home for traders and craftspeople. Other examples of re-use of historic buildings can be found in the Cultúrlann centre in West Belfast, the Verbal Arts Centre in Derry-Londonderry, and in plans to convert part of Armagh Gaol to a boutique hotel.

Skills attainment. The restoration and protection of built heritage often calls for specialist skills in trades such as construction, carpentry or plastering. This provides opportunities to equip both young people and adults with valuable vocational skills, particularly when associated with the regeneration of communities. There is a synergy between the need for specialist construction skills required by restoration and the various government sponsored employment and training programmes.

The Mourne Homesteads Building Project set out to restore many of the fine examples of traditional dwellings to be found in the Mournes area. The project has been in receipt of funding from the Heritage Lottery Fund and a variety of trusts and state agencies. Its work has been recognised in national and international awards and commendations. The project is also an example of the historic environment complementing the natural environment, in this case the Mourne Mountains Area of Outstanding Natural Beauty (AONB). However, the project has also allowed over 270 local people and builders to learn and practice traditional building skills. A travelling exhibition and handbook have also raised awareness of traditional skills and encouraged people throughout Northern Ireland to apply these to the restoration and maintenance of historic vernacular buildings.

Sense of place, identity and pride. The often unique character of historic buildings causes them to be associated with particular locations. The uses to which buildings were once put are often strongly associated with local neighbourhoods, for example where

formerly used for industrial, leisure or religious purposes or where associated with cultural traditions. They are examples of cultural capital that provide symbolic markers in people's lives and a sense of identity and belonging. Where protected, they add civic pride and confidence to the relationship that all residents share with their city.

Towns and cities in Northern Ireland have been fortunate in retaining much of their historic fabric that provides them with a distinct identity. For example, the Harland and Wolff cranes of the Belfast shipyards are very much synonymous of the city's heritage, just as is the case for the Derry Walls, Armagh's cathedrals and the Carrickfergus Castle.

Community capacity and cohesion. Built heritage can be used as a focus for people to become involved in the future of their neighbourhood particularly where restoration projects attract widespread community support and active participation. This encourages people to take responsibility and ownership of the future direction of their communities adding to collective confidence and social cohesion.

Good examples of instances where voluntary trusts have come forth to preserve local heritage are Lissan House in County Tyrone and in the Moravian village of Gracehill, both of which featured in the BBC Restoration series. Demonstrating the capacity of the historic environment to bridge communities, the Cultúrlann Gaelic culture and arts centre in Belfast was created within the structure of the former Presbyterian Church and Orange Lodge. The First Derry Presbyterian Church which overlooks the Catholic Bogside was reopened at an interdenominational ceremony in 2011 with cross-community support.

Environmental quality. The protection, restoration and maintenance of built heritage directly enhance the environmental quality of local neighbourhoods. Restoration projects, particularly where they involve the participation of the community, stimulate similar initiatives in the surrounding area. Restoration can itself save on resources through the re-use of existing buildings and the energy embodied in construction and materials. Demolition and construction waste accounts for 35% of the total waste produced in the UK (Defra, 2011). In addition, many historic buildings have a strong association with the natural or semi-natural setting in which they are located, including the local countryside or coastline, or parks and gardens. This is a setting that can attract amenity, recreation and tourism, contributing directly to health and quality of life.

Table 2.1 presents some examples of historic environment sites in Northern Ireland and the types of economic benefits they generate. The list is not comprehensive and some of the examples are analysed in further detail as case studies in Section 4.

Our case studies (Section 4) of the Causeway Coast and Lough Erne amply demonstrate the relationship between the historic and natural environment. The Giant's Causeway is the 'poster boy' for the former, but the coast would fail to be the attraction that it is without such sites as Dunluce Castle, the Carrick-a-Rede rope bridge and the Old Bushmills Distillery. In Fermanagh, the tranquil beauty of Lough Erne is complemented by its wartime flying boat heritage and the many ancient remains, early Christian sites and castles scattered around its shores. The National Trust gardens at Rowallane, County Down and the lakeside surroundings at Crom draw as many visitors as Trust's built heritage, while the demesnes at Mount Stewart, Florence Court and Castle Coole themselves contain features of historical interest and are as much heritage features as the plantation properties with which they are associated.

Table 2.1: Examples of heritage assets providing wider economic benefits

Giving people a sense of identity		
Dunluce Castle	Co. Antrim	Very much an image of Northern Ireland along with the Giant's Causeway with ties to folklore
St. Columb's Cathedral	Derry-Londonderry	Most historic building in Derry-Londonderry. Includes displays and artefacts from the siege of the city
Derry Walls		Symbolic of the city's history. Urban realm investments underway for UK City of Culture
First Derry Presbyterian Church		Recently renovated with the Blue Coats School. Tells history of Presbyterianism in the city
Apprentice Boys Memorial Hall		Museum and exhibition of siege and relief of the city
Guildhall		City's premier civic centre. Will be focal point of events during 2013 UK City of Culture.
Community capacity/cohesion		
First Derry Presbyterian Church	Derry-Londonderry	Now often used for cross cultural events, e.g. "Talk across the Walls" initiative
Crescent Arts Centre	Belfast	Installed in Ladies' Collegiate School founded in 1873. Recipient of RICS Community Benefit award.
The Playhouse Theatre	Derry-Londonderry	Renovated and opened in 1992. Community arts/resource centre on neutral site in city
Diamond War Memorial		The Memorial demonstrates how there is an almost 50/50 balance of Protestant and Catholic names on the plinth. Opened up gates of memorial to all.
Aras Colmcille		Oldest surviving purpose built school.
Regeneration		
Cathedral Quarter	Belfast	Public and private investment in urban regeneration.
Ebrington Barracks	Derry-Londonderry	Mixed use and cultural development meeting community cohesion objectives too through the link to city provided by the Peace Bridge
Environmental quality		
Causeway Coast	Co Londonderry Co Antrim	Combining built and natural heritage
Guildhall Square & Waterloo Place	Derry-Londonderry	Public realm development
Castle Coole	Co Fermanagh	Gardens designated as site of scientific interest
Access and learning		
Apprentice Boys Memorial Hall	Derry-Londonderry	Educational tours for Leaving Cert students
The Playhouse Theatre		Education and Outreach Dept. Open College Network accredited status
Enniskillen Castle	Co. Fermanagh	Education and outreach
Armagh Observatory and Planetarium	Co. Armagh	Education and outreach
Armagh Public Library		Education and research

3. Economic Impacts of Northern Ireland's Historic Environment

3.1 Our Approach

This section presents the approach we developed for a robust, evidence-based analysis of the historic environment's economic impact in terms of Gross Value Added (GVA), employment and output. Our work followed best practice in economic impact assessments and sought to maximise the degree of comparability between the analysis for NI and other recent studies conducted in Scotland and Wales.

Our quantitative assessment of the economic impact of NI's historic environment encompassed:

- **Direct impacts**, including:
 - Relevant expenditure by **core organisations** with a role in managing and promoting the historic environment;
 - Estimated expenditure by the **construction industry** on repairs and maintenance of the historic environment; and
 - Estimated expenditure by **tourists** visiting NI primarily because of its historic environment; and

- **Indirect and induced impacts**, such as:
 - Expenditure by firms supplying the organisations and industries which are delivering direct impacts as noted above; and
 - Increased expenditure by the people working in organisations and industries delivering both direct and indirect impacts.

Based on the information available to us, we have selected 2010 as a suitable base year for our analysis.

To underpin our analysis, we gathered a wide range of quantitative information to which economic values can be assigned (e.g. number and type of visitors) and economic information itself (e.g. average spending by visitors). Some of this information was gathered through a purpose built questionnaire and others through making individual contacts with the relevant organisations.

3.2 Stakeholder Survey – Design and Implementation

An electronic questionnaire was sent to 88 stakeholder organisations across sectors including local and central government, voluntary and community organisations and churches.

To maximise the number and quality of responses received, we issued the questionnaire and subsequent reminders under DOE's name, and held a consultation period open from early September 2011 to the end of October 2011, a period of seven weeks, with a further consultation period open from the end of January 2012 to the beginning of February 2012, a period of two weeks.

The areas addressed by the questionnaire are summarised below, and the questionnaire is attached in full at Annex 2:

- Nature of organisation's core activities within the historic environment:
 - Listed/historic buildings;
 - Archaeology sites;
 - Conservation areas;
 - Gardens/designed landscapes;
 - Historic landscapes;
 - Marine historic environment;
 - Natural environment;
- Staffing:
 - Number of permanent Full-Time Equivalent (FTE) employees involved in relevant activities;
 - Number of seasonal FTE employees involved in relevant activities;
 - Analysis of employment between areas of historic environment activity;
 - Proportion of employees resident in NI;
 - Gross annual expenditure on wages and salaries;
 - Percentage of payroll expenditure attributable to employees resident in NI;
 - Extent of volunteer input to delivery of organisation's functions;
- Annual non-payroll operating expenditure related to historic environment;
- Annual capital expenditure related to historic environment;
- Annual income associated with historic environment activities (grant income and other sources);

- Visitor numbers (where relevant to organisation);
 - Annual number of visitors and tourists;
 - Proportions of visitors staying overnight and on day trips;
 - Geographical origin of visitors (NI, GB, ROI, elsewhere);
 - Proportion of visitors principally attracted to NI by historic environment.

- Questions about the respondents' perception of wider social values – qualitative assessments, types of benefits provided (e.g. learning, environmental protection, regeneration), size and composition of the wider social beneficiary population and other more focused questions depending on the outcome of other aspects of our work and the type of heritage asset managed by the individual respondents contacted.

We targeted a survey response rate of 20% in line with our prior experience of similar projects. In total, we received 19 responses from the 88 stakeholders, representing a response rate of 21.6%. However, this figure included a number of nil returns and other responses where stakeholders were not able to provide detail in all the areas requested. Consequently, this means that the survey responses cannot be regarded as being fully representative of the sector.

On a sector-by-sector basis, the highest response rate came from local government, with nine Councils submitting responses to the survey. The remaining respondents included local museums, churches and voluntary sector organisations.

The level and nature of stakeholder responses presented us with a number of practical challenges in conducting analysis on the survey results, particularly in relation to completeness and consistency of quantitative data gathered across different stakeholders. For instance, respondents generally indicated that they did not record details of visitor numbers and were therefore unable to provide these details as part of the survey. This reflects a lack of relevant quantitative information available within the sector. Therefore, survey responses are supported by our review of the literature and consultations with the core organizations and construction sector. Where Northern Ireland specific information was not available or not detailed enough, we have used proxy information from elsewhere.

3.3 Stakeholder Survey – Summary Results

Despite lacking sufficient quantitative information, the survey revealed some useful insights and qualitative assessments by the respondents. These are summarized here and relate to trends in visitor numbers, marketing and promotion, collaboration and benefits arising from this and social benefits as summarized below.

Trends in Visitor Numbers

70% of survey respondents reported an increase in numbers visiting their historic environment sites over the past five years. Reasons put forward for this trend included:

- Improved facilities;
- Better marketing and promotion;
- Enhanced provision of information;
- Greater community awareness through a range of initiatives;
- Extended opening times;
- An increased understanding of the importance of Northern Ireland's historic environment sites;
- Economic climate encouraging increased public usage of free attractions; and
- Improved programme of regular events targeted at both children and adults.

However, responses also suggested a reduction in the number of school groups visiting historic environment sites, due to funding constraints at individual school level.

Marketing and Promotion

Survey responses indicated that the principal means of marketing and promoting historic environment attractions were as follows:

- The organisations' own websites;
- Printed brochures and literature; and
- Stands at festivals and tourism fairs.

Stakeholders also stated that other promotional channels commonly employed included:

- Websites of other organisations;
- Social media sites; and
- Television and radio.

Collaboration and Benefits Arising

Survey respondents indicated that they collaborated with a range of partners in delivering activities relevant to the historic environment. The main partnerships highlighted were with:

- Central government (58% of respondents);
- Local government (83% of respondents);
- Community groups (83% of respondents);
- Tourism organisations (58% of respondents); and
- Partners in the rest of the UK (50% of respondents).

However, our survey suggested that a smaller proportion (41%) of respondents collaborated with partners in the Republic of Ireland.

Those respondents most actively involved in collaborations with other organisations observed a range of benefits arising, including:

- Increased profile and higher visitor numbers for attractions;
- Access to additional funding sources (e.g. INTERREG IVA) to further improve the tourism potential of sites;
- Networking potential;
- Provision of specialist technical advice from other organisations relating to preservation and management of historic environment sites;
- Joint promotional activities; and
- Sharing of information and ideas for visitor development.

Wider Economic (Social) Benefits

Aside from quantitative measures, respondents to the survey 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 less advantaged in society (68% of respondents).

In recognition of the factors above, survey participants highlighted a number of steps they have taken to enhance the wider benefits experienced by people who do not visit historic environment sites. These included:

- Community participation schemes (e.g. production of photographic publications);
- Specific lobbying and campaign work with central and local government to ensure that the benefits of heritage-led regeneration are understood;
- Working with community groups under the PEACE III initiative on various historical themes, displays and publications; and
- Carbon offsetting through tree planting and management of conservation areas.

3.4 Direct Economic Impacts – Quantitative Analysis

We have analysed and presented the estimated direct economic impacts generated through the stakeholder survey and also individual contact with core organisations and the construction sector.

3.4.1 Core Organisations

We have considered in detail relevant expenditure undertaken by organisations at the core of the historic environment sector, including large employers and grant-awarding bodies (i.e. NIEA, NITB, HLF, Department for Social Development and National Trust). Information from other organisations that play an active role in the historic environment (e.g. local Councils and relevant Non-Government Organisations) has been sought/obtained via our stakeholder survey but was not in sufficient quantitative detail as mentioned in Section 3.2.

Table 3.1 summarises this information with further details provided below. Due to the UK-wide nature of the National Trust's activities, we were unable to identify relevant information in relation to the level of its expenditure within Northern Ireland.

Table 3.1: Summary of expenditure by core organisations in the historic environment sector

Core organisation	Expenditure estimate	Notes
Northern Ireland Environment Agency (NIEA)	£11 million (+/- 20% sensitivity: £10.9 - £11.3 million)	NEIA financial accounts. Includes expenditure for the Built Heritage Directorate and proportion of corporate services budget Excludes Natural Heritage Directorate
Northern Ireland Tourist Board (NITB)	£23.4 million (+/- 20% sensitivity: £18.8 - £28 million)	NITB financial accounts. Includes promotion and marketing spending and financial assistance to specific projects Excludes staff and running costs
Heritage Lottery Fund (HLF)	£5.2 million	Information from HLF Includes grants and staff costs. Not necessarily net but relevant
Department for Social Development (DSD)	£10.1 million	Information from DSD Includes grant expenditure Excludes staff costs
National Trust (NT)	£5.5 million	Information from NT

Northern Ireland Environment Agency (NIEA)

NIEA's Built Heritage Directorate carries primary responsibility for the Agency's activities in relation to the historic environment. The Agency's financial statements for the year ended 31 March 2010 identify the expenditure incurred by the Built Heritage Directorate presented in Table 3.2.

Table 3.2: NIEA financial statement (year ending 31.03.2010)

Built Heritage Directorate costs	£m
Grants to other organisations	3.5
Other programme expenditure	2.6
Staff and other administration costs	3.8
Net operating cost	9.9

Detailed information was not readily available regarding the split of grant expenditure between capital and revenue funding.

In addition, NIEA incurs other corporate services costs in supporting the activities of its three operational Directorates (Built Heritage, Natural Heritage and Environmental Protection). In 2009-10, the Agency's corporate services costs amounted to £4.9m. In seeking to establish the economic impact of these central support activities relating to the historic environment, we have apportioned corporate services costs between the three operational Directorates on the basis of each Directorate's net operating cost.

For 2009-10, the three operational Directorates above had a combined net operating cost of £40.9m, of which the Built Heritage Directorate's net operating cost of £9.9m represented 24%. Applying this proportion to the Agency's corporate services costs of £4.9m would yield a figure of **£1.2m** in central support costs attributable to the historic environment. Applying a general sensitivity of 20% around this base case estimate would produce a range of £1.0m to £1.4m.

Taking costs for the Built Heritage Directorate together with an appropriate proportion of central support costs, we therefore estimate that the annual direct economic impact associated with NIEA's activities is **£11.1m**, within a range of **£10.9m** to **£11.3m**.

Figures are not readily available for any costs arising within NIEA's Natural Heritage Directorate which may pertain to the historic environment, and as a result these have been excluded from our analysis. The above estimate therefore represents a prudent assessment of the impacts associated with NIEA's activities.

Northern Ireland Tourist Board (NITB)

Aside from attracting visitors to NI, the activities of NITB generate a range of impacts in relation to the historic environment sector through areas such as grants made to historic environment projects, promotion and marketing of the historic environment and expenditure on support services for these 'frontline' activities.

Information supplied by NITB indicates that, for 2010, expenditure in relation to the promotion and marketing of the historic environment totalled **£0.6m** and included:

- £0.5m on TV and radio advertising for built heritage sites; and
- £0.1m on promoting NI's garden tourism offering and group visits to relevant sites.

NITB also provides financial assistance to a range of tourism projects across NI, covering a number of key themes within the region's tourist offering, such as:

- Giant's Causeway/Antrim and Causeway Coast area;
- Titanic (Maritime)/Belfast;
- Mourne;
- Walled City of Derry; and
- Christian Heritage/St Patrick.

Over the period 2008-11, information provided by NITB indicates financial assistance of some £68.3m was extended to projects with a degree of linkage to the historic environment. We have therefore used the average annual expenditure on financial assistance over the three-year period in our analysis. This amounts to an annual figure of some **£22.8m**. Applying a general sensitivity of +/-20% to this estimate would produce a lower boundary of **£18.2m** and an upper boundary of **£27.4m**.

Combining the above, we therefore estimate the annual economic impact associated with NIEA's activities (distinct from tourist visitors attracted to NI) is some **£23.4m**, within a range of **£18.8m** to **£28.0m**.

NITB also incurs staff and other running costs in providing support services for the activities above, across functional areas including:

- Business Development;
- Product Development;
- Organisational Development;
- Corporate Development; and
- Marketing and Events.

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
Total	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		
	Base	Lower Limit	Upper Limit
	£m	£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

³ <http://www.dfpni.gov.uk/eag>

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

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 Commerce⁴ (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.

Table 3.9: Net employment

	Range		
	Base	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

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

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 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	191.7		153.4	230.0
Domestic leisure day visits				
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	£153.2		£122.6	£183.8
	m		m	m
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)

	Range			
	Base		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)

	Range			
	Base		Lower Limit	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).

Table 5.3 below summarises per-capita impacts in terms of output, employment and GVA across Northern Ireland and neighbouring jurisdictions (excluding domestic tourism).

Table 5.3: Comparison of key results across Northern Ireland, Republic of Ireland, Scotland and Wales (excluding domestic tourism)

	NI	ROI	Scotland	Wales
Base year	2010	2009	2007	2009
Population (m)	1.8	4.6	5.1	2.9
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:

RECOMMENDATION 1: Develop a coherent strategy and implementation plan for realising the potential of the historic environment

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.

RECOMMENDATION 2: Increase public sector funding 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.

RECOMMENDATION 3: Review the presentation of historic environment sites 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.

RECOMMENDATION 4: Sustain and increase the present level of impact generated by the historic environment in Northern Ireland

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.

RECOMMENDATION 5: Organisations involved in the historic environment should consider ways of expanding their existing linkages with suitable partners (including links with 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.

RECOMMENDATION 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.

References

Alberini, A., Riganti, P. and Longo, A. (2003) 'Can People Value the Aesthetic and Use Services of Urban Sites? Evidence from a Survey of Belfast Residents', *Journal of Cultural Economics*, Volume 27, Number 3-4, 193-213.

Allison, G., Ball, S., Cheshire, P., Evans, A. and Stabler, M, (1996) *The Value of Conservation: A Literature Review of the Economic and Social Value of Cultural Built Heritage*, The Department of Natural Heritage, English Heritage and the Royal Institution of Chartered Engineers.

Ahlfeldt, G.M., Maennig, W., (2010) Sustainability and Complementarity of Urban Amenities. *Real Estate Economics* 38, 36.

Atlantic Consultants (2003) Cornish mining world heritage site bid. Economic Impact Assessment. June 2003, Atlantic Consultants for Cornwall Enterprise. [http://www.tourisminsights.info/ONLINEPUB/SOUTH%20WEST%20TOURISM/SWT%20PDFS/ATLANTIC%20CONSULTANTS%20\(2003\)](http://www.tourisminsights.info/ONLINEPUB/SOUTH%20WEST%20TOURISM/SWT%20PDFS/ATLANTIC%20CONSULTANTS%20(2003)) accessed 01/11/11.

Blackwater Partnership (2006) *Ulster Canal: Socio-economic Study*. Price Waterhouse Coopers. British Waterways 2003. *The Economic Impact of the restoration of the Kennet and Avon Canal*, by Ecotec.

Bridge, G. (2006) Perspectives on Cultural Capital and the Neighbourhood, *Urban Studies*, 43 (4) pp719-740.

Casey, B., Dunlop, R and Selwood, S. (1996) *Culture as Commodity – the economics of the arts and built heritage in the UK*, Policy Studies Institute.

CogentSI (2007), 'Tourism in the Northern Ireland Economy', Volume 1.

Defra (2011), *Waste Data Overview*, June.

DETI (2011), *Northern Ireland Annual Business Inquiry 2010*, 21 December 2011.

Ecorys and Fitzpatrick Associates (2012), *Economic Value of Ireland's Historic Environment*, Final Report to the Heritage Council.

Ecotec (2010) *Valuing the Welsh Historic Environment Study*.

Ecotec (2008) *Economic Impact of the Historic Environment in Scotland*, report to Historic Environment Advisory Council for Scotland.

English Heritage, (2004) *Heritage Counts – State of the Historic Environment 2002-2004*.

English Heritage, (2010) *Impact of Historic Environment Regeneration*. AMION Consulting Limited.

English Partnership (2008), *Additionality Guidance*.

Guy G and Willis K (2002), *Northumbria: castles, cathedrals and towns in Navrud*, S. & Ready, R.C. *Valuing Cultural Heritage*.

Hambrey Consulting (2007) Social, economic and environmental benefits of World Heritage Sites, Biosphere Reserves, and Geoparks. Scottish Natural Heritage Commissioned Report No. 248 (ROAME No. F06NC05).

HM Treasury (2003) *The Green Book*.

Klamer, A. (2002) Accounting for Social and Cultural Values. *De Economist*, 150 (4)

Landry, C., (2003) *Imagination and Regeneration: Cultural Policy and the Future of Cities*. DG-IV (EU) Education, Culture and Heritage, Youth and Sport.

Matarosso, F., (1997) *Use or Ornament? The Social Impact of Participation in the Arts*. Comedia, London.

Morrissey, K and Moron, C. (2011) The Market and Non-market value of water based activities in the West of Ireland, National University of Ireland Galway Working Paper.

Morrissey, K., Hynes, S., Cuddy, M. and O'Donoghue, C. (2010) *Ireland's Ocean Economy 2007*, Socio Economic Marine Research Unit, National University of Ireland, Galway.

Navrud S and Strand J (2002) *Social costs and benefits of preserving and restoring the Nidaros Cathedral in Navrud*, S. & Ready, R.C. *Valuing Cultural Heritage*.

Northern Ireland Tourist Board (2010) *Northern Ireland's Top 20 Visitor Attractions 2010*.

RICS, English Heritage and Investment Property Databank (1995) The investment performance of listed buildings – 1994 update. Royal Institution of Chartered Surveyors.

Sable, K. and Kling, R.W. (2001) The Double Public Good: A Conceptual Framework for "Shared Experience" Values Associated with Heritage Conservation, *Journal of Cultural Economics*, 25.

Schaeffer, P.V., Millerick, C.A., (1991) The Impact of Historic District Designation on Property Values: An Empirical Study. *Economic Development Quarterly* 5, 11.

Sommers, P., Carlson, D., (2000) *The New Economics in Metropolitan Seattle*. Brookings.

Throsby, D. (2001), *Economics and Culture*, Cambridge University Press.

Whitehead, J.C. and Finney, S.S. (2003) 'Willingness to Pay for Submerged Maritime Cultural Resources', *Journal of Cultural Economic*, Volume 27, Number3-4, 231-240.

Willis, K. and Garrod, G. (2001) Valuing Open Access Recreation on Inland Waterways: On-site Recreation Surveys and Selection Effects. *Regional Studies*, 25 (6), pp511-524.

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.

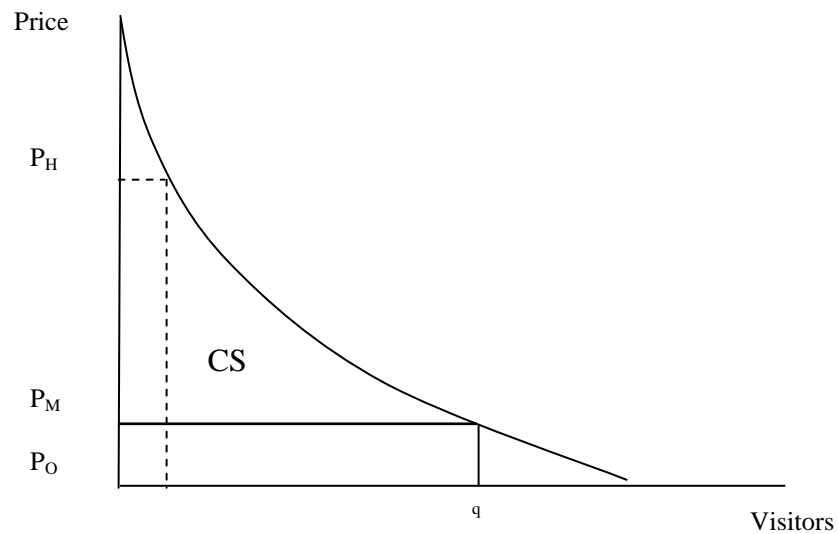


Figure A.1: Stylised demand curve

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 undertaken 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

St Patrick's Heritage	
Project Benefits	
Economic	<p>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 Col Cathedral, St Patrick Trian Visitor Centre, Down Cathedral & St Patricks Grave, Down County Museum and The Saint Patrick Centre).</p> <p>Key areas of economic benefit include:</p> <ul style="list-style-type: none"> • Visitor expenditure • Employment creation • Increased footfall in destination areas/generating expenditure in some local businesses <p>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.</p> <p>The estimated quantum of visitor impact at the Saint Patrick Centre is c£800,000.</p>
Social	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Conservation of historical buildings/monuments
Key Issues/Challenges	
<ul style="list-style-type: none"> • Extensive range of sites, representing various stages of development • Financial viability /sustainability of key assets 	
Recommendations	
<ul style="list-style-type: none"> • Investment in trail development (e.g. physical improvements, interpretative information, signposting) further investment into archaeology excavation is required at various sites) • 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	
<ul style="list-style-type: none"> • Extensive range of sites, representing various stages of development • Financial viability /sustainability of key assets 	
Recommendations	
<p>In order to maximise the benefits associated with the historic environment along the Causeway Coastal Route, consideration should be given to:</p> <ul style="list-style-type: none"> • 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'); 	

St Patrick's Heritage

- **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).

Causeway Coastal Route (including Dunluce and Carrickfergus Castles)

Project Benefits

Economic

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:

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

Causeway Coastal Route (including Dunluce and Carrickfergus Castles)	
	Other economic benefits generated by heritage conservation include: employment and provision of training/development opportunities
Social	<ul style="list-style-type: none"> • 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)
Other	<ul style="list-style-type: none"> • Protecting heritage for future generation
Key Issues/Challenges	
<ul style="list-style-type: none"> • Extensive range of sites, representing various stages of development • Financial viability /sustainability of key assets 	
Recommendations	
<p>In order to maximise the benefits associated with the historic environment along the Causeway Coastal Route, consideration should be given to:</p> <ul style="list-style-type: none"> • 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	<p>Derry City Walls</p> <p>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.</p> <p>The three restored buildings provide employment for approximately 19 FTE staff.</p> <p>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.</p>

Derry City Walls and Ebrington Barracks	
	<p>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.</p> <p>It is anticipated that the City's Walled Lighting Strategy will enhance the evening economy.</p> <p>Ebrington Barracks Project Creating active use of buildings located on the site. Potential to create employment and training/development opportunities.</p>
Social	<p>Creating Safer Spaces - It is anticipated that the Walled City's Lighting Strategy will contribute to a safer environment.</p> <p>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.</p> <p>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.</p> <p>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.</p>
Other	<p>Derry City Walls – Conservation/protection of six historical buildings Ebrington Barracks Project – Conservation/protection of 14 listed buildings</p>
<p>Key Issues/Challenges</p> <p>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.</p> <p>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.</p>	
<p>Recommendations</p> <ul style="list-style-type: none"> • 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	<p>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.</p> <p>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 excess of £500,000 per annum with the total visitor economic contribution estimated at over £35 million.</p>
Social	<p>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.</p> <p>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.</p>
Key Issues/Challenges	
<p>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.</p>	

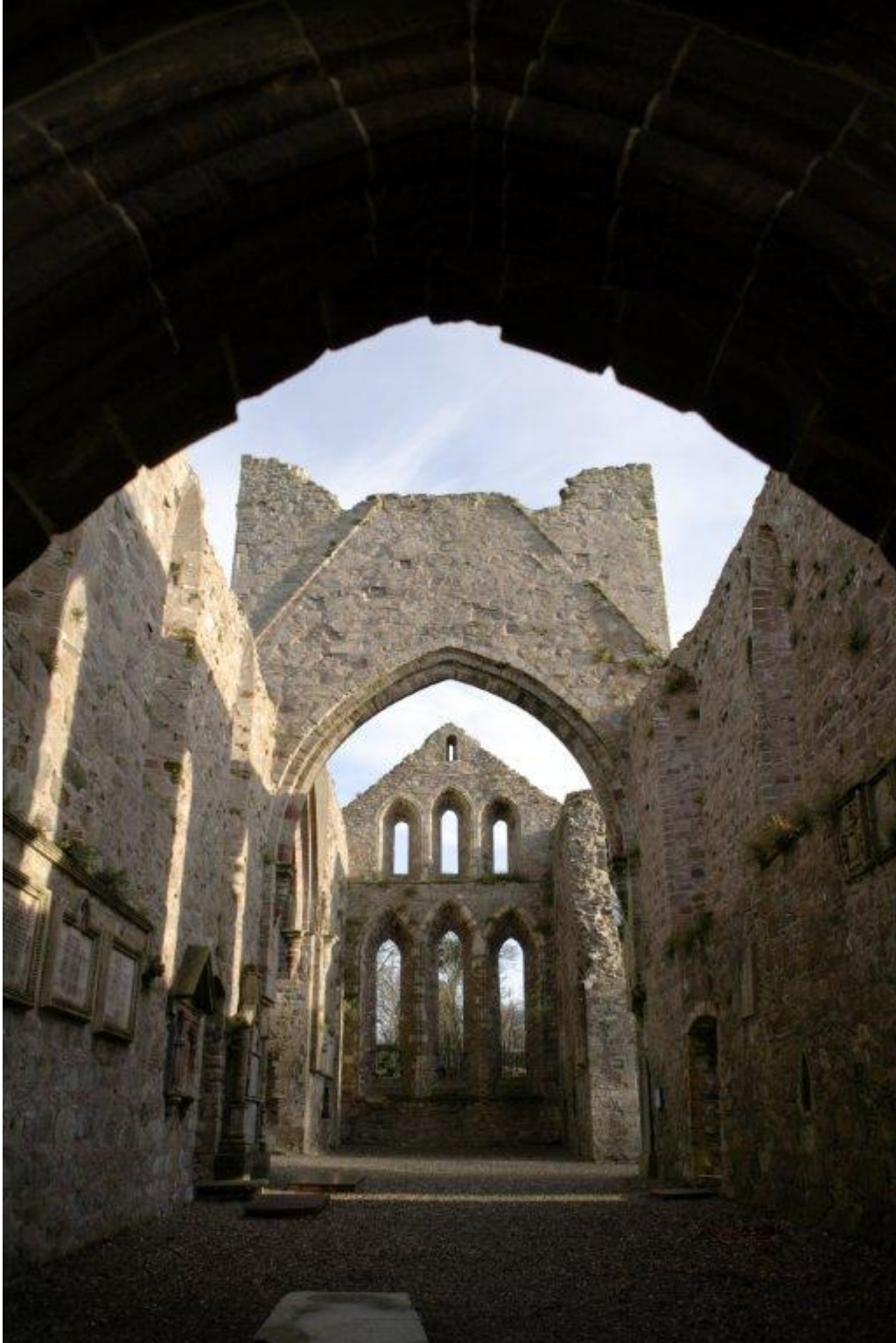
Lough Erne and Fermanagh	
Project Benefits	
Economic	<p>Lough Erne is a well established tourist destination in view of its natural and historical heritage, appealing to water related recreation but also coach tours.</p> <p>The principal destination is the Lough itself, although Belleek Pottery attracts around 250,000 visitors each year and Marble Arch Caves around 70,000.</p> <p>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.</p>

Lough Erne and Fermanagh	
Social	<p>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.</p> <p>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.</p>
<p>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.</p>	

Belfast Cathedral Quarter	
Project Benefits	
Economic	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Provide a focal point for urban regeneration • Conservation of historic buildings
<p>Key Issues/Challenges</p> <ul style="list-style-type: none"> • Economic, social and environmental sustainability 	
Recommendations	
<p>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.</p>	

Belmont Tower	
Project Benefits	
Economic	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Supported by c30 volunteers per annum • Provides a venue for community/voluntary sector meetings/activities • Contributes to civic pride and well being
Other	<ul style="list-style-type: none"> • 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	
<ul style="list-style-type: none"> • Future sustainability – corporate and repeat bookings have declined during the economic recession • Future opportunities – creation of linkages with forthcoming tourism events/initiatives 	
Recommendations	
<ul style="list-style-type: none"> • 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). 	

SAINT PATRICK'S HERITAGE CASE STUDY



Contents

1. INTRODUCTION	1
2. BACKGROUND	1
3. ILLUSTRATION OF SITE SPECIFIC ECONOMIC AND SOCIAL BENEFITS.....	8
4. KEY AREAS FOR IMPROVEMENT	9
5. CONCLUSIONS	11
ANNEX I: SAINT PATRICK'S HERITAGE SITES	13
ANNEX II: THE ECONOMIC VALUE OF THE INDEPENDENT MUSEUM SECTOR	19
ANNEX III: BENCHMARKING (NI / ROI / GB)	20

1. Introduction

This case study provides an overview of Saint Patrick's Heritage, an asset which contributes to tourism in Northern Ireland (NI), generating economic and social returns. The case study also highlights the untapped potential of the assets attributed to Saint Patrick across the island of Ireland, therefore offering future opportunities for economic growth where all heritage links should be promoted on a partnership basis (i.e. to include relevant churches, local authorities and tourism bodies) as a combined tourism product.

2. Background

NI has unique and long established links with Saint Patrick. He is the patron saint of Ireland and his feast day is celebrated on 17th March throughout the world by the Irish diaspora (to include: Great Britain, Canada, the United States, Argentina, Australia, and New Zealand).

Saint Patrick lived and worked in the 5th century, where he established Christianity and the first church on the island of Ireland. Saint Patrick was ordained a priest in his home country of Wales and returned to Ireland in 432 where he baptised and ordained followers of the Christian faith. Both the Church of Ireland and the Roman Catholic Cathedrals in Armagh are churches linked to Saint Patrick. Armagh itself is seen traditionally as the ecclesiastical capital of Ireland. Saint Patrick died in 461 and his remains are buried in the graveyard of Down Cathedral.

Saint Patrick and Christian Heritage has been designated as a 'Signature Project'¹ by the Northern Ireland Tourist Board (NITB) as part of 'Tourism in Northern Ireland, A strategic Framework for Action (2004-2007)'. Signature Projects have been identified for their potential to deliver world class excellence, drawing visitors from home and overseas. The Saint Patrick and Christian Heritage Project is primarily based on the areas of Armagh and Downpatrick, with Bangor and Newry as secondary areas.

NITB, Armagh District Council and Down District Council developed an 'Action Programme (2005-2007)', which consisted of six priority themes, namely:

¹ NITB's five signature projects include: The Walled City of Derry; Giant's Causeway, Antrim and Causeway Coast; Titanic (Maritime); St Patrick & the Christian Heritage; and the Mourne National Park

- Working in partnership;
- Developing a Saint Patrick's Trail*;
- Creating a memorable Experience;
- A co-ordinated events and festival programme;
- Strong marketing and branding, and
- Developing cross border activities.

*Saint Patrick's Trail has been developed as the primary product offering. The Trail (92 miles) comprises of 15 key Christian Heritage Sites and 14 secondary sites (Refer to Map 1 and Table 1) that link aspects of Saint Patrick's life in Ireland. Not only does it tell the story of Saint Patrick's journey it also allows visitors to learn about Christian Heritage and experience NI and the attractions that are available to them.

In 2008, NITB commissioned research² to inform the development of the Saint Patrick's Trail. The research involved a robust review of sites associated with Saint Patrick and the wider Christian Heritage, which were subsequently categorised into 'interpretive themes' that provide authenticity, integrity and connectivity for Trail users i.e. historical sites were classified as: Saint Patrick's Life; Saint Patrick's Mission; Saint Patrick's Legacy; and Pre-Christian Ireland.

The report acknowledged that the sites vary in terms of quality, significance and relevance, therefore the Signature Project should establish priorities for development and investment that will involve upgrading or improving facilities at individual sites as well as providing a unifying framework within which to visit them.

Recommendations for Trail development included a series of 'cluster' sites linked through a brand identity, the key interpretive themes, interpretive events and integrated marketing. Saint Patrick's Trail is divided into four clusters. The two main clusters comprising to patrician sites is the City of Armagh and Downpatrick. The remaining clusters include Bangor and Newry to include sites relating to Saint Patrick's mission. The trail also extends to include Slemish Mountain³ in Ballymena. Directional signage is now prominent across all the main areas associated with Saint Patrick and the wider Christian Heritage in NI.

The rationale for the clusters, rather than a linear driving route, is because Saint Patrick's Trail is about the sites and the locations rather than the journey or the views. Therefore, the journey in-between the sites is less interesting or relevant to general visitors such as families, couples, walkers or school groups, who may wish to be more selective in terms of visiting the main sites. However, it is important to recognise the motivations of 'pilgrims' who may wish to take the journey as a means of devotion and due to reasons relating to religious/spiritual benefits. This cluster approach puts an emphasis on the group of attractions and sites within a local area but retains its context as part of the overall Saint Patrick's Trail.

According to NITB's Annual Report (2009/10), continued investment in Saint Patrick and Christian Heritage Signature Project has been made i.e.:

- *"The Saint Patrick and Christian Heritage Signature Project continues to progress following the launch of the Saint Patrick's Trail by Tourism Minister Arlene Foster in March 2009. This 92 mile signed driving route from Bangor to Armagh ties together key*

² PLB Consulting Limited, St Patrick's Trail Interpretation Strategy, December 2008

³ The mountain rises about 1500 feet (437 metres) above the surrounding plain, and is central core of an extinct volcano. Following his capture and being brought as a slave to Ireland, Patrick worked as a shepherd at Slemish Mountain for about six years, from ages 16 through 22.

sites in the region which have a strong link with Saint Patrick's life, legacy and landscape.

- *In 2009/2010 the Saint Patrick and Christian Heritage Signature Project was given a £3.5 million allocation under Programme for Government to provide assistance through the Tourism Development Scheme. 23 projects along the Saint Patrick's Trail have progressed to full economic appraisal.*
- *Through the Tourism Development Scheme, a £500,000 funding boost was confirmed to bring to life the story of Saint Patrick and develop Christian heritage tourism in Armagh"*

Sites which can be regarded as having significant importance in the context of Saint Patrick's life and legacy include:

- Saint Patrick's Cathedral (Church Of Ireland) Armagh – Visitor Numbers 40,000 in 2010;
- Saint Patrick's Cathedral (Roman Catholic) Armagh – Visitor Numbers 10,000 in 2010;
- Down Cathedral & Saint Patrick's Grave, Downpatrick – Visitor Numbers 49,858 in 2008;
and
- The Saint Patrick Centre, Downpatrick – Visitor Numbers 89,483 in 2010.



a. Saint Patrick's Trail – Location & Overview of Historic Assets

Figure 1 illustrates the location of the historic assets along Saint Patrick's Trail and Annex I provide a description of these sites i.e. site description, 'interpretive theme', link with Saint Patrick, ownership, visitor numbers, target audience and entrance fee (where applicable).

Figure 1: Location of Saint Patrick's Heritage Sites



Key	Historic Asset	Key	Historic Asset	Key	Historic Asset
1	St Patrick's Cathedral (Church Of Ireland)	11.	Saul Church	21.	Dromore Cross
2.	St Patrick's Catholic Church	12.	Struell Wells	22.	Hollywood Priory
3.	Armagh County Museum	13.	Grey Abbey	23.	Kilbroney Graveyard
4.	Armagh Public Library	14.	Bangor Abbey	24.	Killeevy Old Churches
5.	St Patrick's Trian Visitor Centre	15.	North Down Museum	25.	Kilnasagart Stone
6.	Avenal's Castle	16.	Armagh Franciscan Friary	26.	Movilla Abbey
7.	Down Cathedral & St Patrick's Grave	17.	Cardinal Tomas Ó Fiaich Memorial Library & Archive	27.	Nendrum Monastic Site
8.	Down County Museum	18.	Craigavon Museum	28.	St Patrick's Stone, Coney Island
9.	The Saint Patrick Centre	19.	Donaghmore High Cross	29.	Seagoe (Saint Goghans)
10.	Inch Abbey	20.	Dromore Cathedral	30.	Navan Centre & Fort (NB. Pre-Christian Heritage)

Source: www.discovernorthernireland.com/Saint-Patrick-Trail-Map

b. Tourism Potential

In 2009, NITB reported⁴ a 3% increase in the number of visitors/trips to NI to 3.1m, when compared to the previous year. However, there was a 3% reduction in spend to £507m. Visitors from the Republic of Ireland (RoI) and Great Britain (GB) accounted for 70% of this spend and the remaining spend was from overseas visitors.

NITB's targets for 2020 highlight the focus on restoring tourism growth, to include:

- **A wealth generator:** The total revenue generated by the NI tourism industry will double to £1 billion.
- **A job creator:** 50,000 jobs will be sustained by tourism activity.
- **An export generator:** In 2020 whilst staying in NI visitors from outside the UK will generate £350 million. Visitors from out-of-state (including GB and RoI) will generate £750 million.
- Increase visitors to 4.5 million.

Tourism officials are hoping that the completion of signature projects (including Saint Patrick's Heritage Trail) as well as other major projects will help boost the tourism numbers and spend.

Over 70 million people all over the world claim to have links with the Island of Ireland. Tourism Ireland stated that it intended to exploit this interest in 2011⁵.

A priority will be the restoration of growth from the GB market which accounts for 50% of all overseas to the island of Ireland and 35% of revenue. Target markets will also include the US, Germany and France. These four markets account for three-quarters of all overseas visitors. The marketing campaign will include promotion of Ireland on TV, radio, and social media to reach up to 200 million potential holiday makers.

Tourism Ireland's marketing campaign includes global promotion of Saint Patrick's in order to attract potential holiday makers, particularly from the Irish Diaspora, including US, GB and Australia. The Irish Diaspora link is an important asset which should be maximised by encouraging overseas visitors to travel to Ireland to appreciate their shared heritage. In October 2011, the former US President, Bill Clinton announced the Irish Diaspora summit in New York, where diaspora are to be invited to invest in Ireland at the 2012 US Economic Forum. This captured audience may provide an opportunity to promote the Irish tourist industry.

Further investment in promoting NI on a cross-border basis is evident, as NITB launched a £1 million campaign in February 2011, which aims to encourage people from Ireland to holiday within NI, which is part of a larger campaign to double the visitor revenue to an annual £1 billion by 2020.

To date the investment has been very successful with the announcement⁶ that tourism performance has improved for the period January to June 2011 when compared to the same period last year.

Salient points to note include:

⁴ Source: Local Authority Tourism Estimates, NITB, 2007-2009

Note: figures relate to all out-of-state visitors to Northern Ireland, visiting for any reason (holiday, business, visiting friends and relatives) and staying for at least one night and NI residents participating in domestic tourism. Day trips are not included.

⁵ 'Fight-back under way to restore Tourism Growth in 2011, Contact Newsletter 'Keeping the Tourism Industry Informed' February 2011 Edition

⁶ The Tourism Statistics Branch, Department of Enterprise Trade & Investment, Statistics Bulletin 'Tourism Performance Estimates NI January to June 2011.

- NI residents took **758,000 overnight trips** within NI; with an associated spend of **£46 million**. In the same period NI residents took 3 million leisure day trips (of which 1 million were tourism day trips) within NI.
- The majority (69%) of overseas visitors to NI were from GB, 17% were from other European countries, 9% were from North America and 5% were from other countries
- 686,000 **overseas visitors** spent at least one night in NI, an **increase of 11%** when compared with January-June 2010. **Overseas visitors spent** an estimated £165 million during the period, an **increase of 24%** compared with January-June 2010.
- An estimated 913,000 hotel, guesthouse and bed & breakfast rooms were sold, an increase of 3% when compared with January – June 2010.
- At June 2011, tourism and leisure jobs accounted for 8% of all employee jobs in NI (i.e. 54,000 jobs), the same proportion as reported in June 2010.
- In the first six months of 2011 the RoI experienced 13% growth or 330,000 more visitors that in 2010.

b) Saint Patrick and Christian Heritage – Tourism Trends

2009 tourism trends relating to Saint Patrick and Christian Heritage⁷ indicate that a lower proportion visited the Saint Patrick/Christian Heritage Signature Project in comparison to other Signature Projects. Consequently, **there is potential to enhance tourism performance by increasing awareness of the heritage sites.**

The majority of visitors were from North America, accounting for 37% of all visitors (i.e. 24% from the US and 13% from Canada), followed by 20% from Europe, 19% from GB and 14% from the rest of the world. The lowest proportion of visitors was from NI/RoI, accounting for only 11% of all visitors to the area. **The importance of the Irish Diaspora is evident based on the profile of visitors to the area.**

St. Patrick/Christian Heritage appeals more to older visitors (41% aged 55+ and only 24% aged under 35), therefore **further promotion should also aim to attract younger generations e.g. school/education trips.**

People who visited the sites enjoyed having a variety of places to visit linked by a common theme. Visitors indicated that the actual experience was: historical (85%), memorable (54%) and unique (43%). These **attributes will help to enhance the brand of Saint Patrick.**

There is also room for improvement in terms of promoting the Saint Patrick brand and its associated assets. For example, the visitor numbers at Saint Patrick's Centre have decreased by 26% from 120,755 to 89,483 visitors in 2010.

⁷ Department of Enterprise, Trade and Investment (DETI), NI Visitor Attraction Survey Jan-Dec 2010. NB. NITB implemented a survey of around 1,500 leisure visitors and domestic holidaymakers staying in Northern Ireland (i.e. excluding day trippers), completed on-line after returning home from their recent visit. In addition, a series of more in-depth face-to-face interviews were completed with visitor and domestic leisure staying and day trippers in the Signature Project areas.

3. Illustration of Site Specific Economic and Social Benefits

Saint Patrick's Centre

When the 'Regional Visitor Spend Assumptions' are applied to **Saint Patrick's Centre**⁸, the economic impact in terms of tourism was **£821,300** in 2010 (38,200 visitors x £21.50 (spend per 'local visitor' per day visit)). The assumptions are based on the Museum Sector rather than a visitor centre but the figure provides an indication of the potential economic impact.

Consultation with representatives of the **Saint Patrick's Centre** also identified that the Centre plays an important role within the local community, for example it has:

- Delivered a Reconciliation Education Programme for young people based on Saint Patrick;
- Provided Community tours aimed at reconciliation using local historic sites and local churches;
- Delivered an outreach lecture programme for groups;
- Hosted community conferences and concerts;
- Maintains a community garden;
- Supports local craftspeople in the Centre's shop;
- Supports local artists in the Centre's art gallery; and
- Provides employment for 21 young disabled people who run the Centre's Daisies Café.

In addition, by March 2012, the Centre intends to raise money for a selected charity based on the theme 'In the Spirit of Saint Patrick'. This will include a major NI-wide campaign involving schools, community groups, churches, the GAA, the Ulster Scots Agency, Irish representatives from the House of Lords, local politicians and the general public. The aim of the campaign is to allow for a better understanding of the shared Christian heritage of Saint Patrick in NI. This will challenge stereotypes, reduce cultural barriers and bring people from different backgrounds to work towards a common goal of helping others.

Down County Museum

When visitor spend and other assumptions relating to the the Economic Value of the Independent Museum Sector have been applied by **Down County Museum**, the value of Museum to the local economy is estimated as follows:

- The Museum has a total gross visitor impact of **£837,542** in the local economy. (Based on 34,299 visitors in 2010. NB. Downpatrick hosts major celebrations on Saint Patrick's Day every year and it is one of the busiest dates in the museum's calendar, when they can receive between 2,000-3,500 visitors).
- The Museum creates total direct, indirect and induced employment value in the local economy of **19 jobs**, with 12 FTE being internal and an additional **7** being sustained in the local area.
- Due to its expenditure on supplies and services, the Museum has a total direct, indirect and induced spend of **£149,666**, comprising £111,900 in direct spend and an additional **£37,766** in indirect and induced spend.

Further detail on this study is provided in Annex II.

⁸ *i.e. to establish indicative Tourism impact, which is measured by multiplying the numbers of local visitors by the average 'spend per local visitor' calculated for Northern Ireland (£21.50), the number of day visitors by 'spend per day visit' (£42.99), and the number of overnight visitors by 'spend per night' (£39.69). Source: The Economic Value of the Independent Museum Sector Association of Independent Museums Final Report June 2010*

4. Key Areas for Improvement

Promotion of Saint Patrick Brand

Saint Patrick is an international brand, recognisable throughout the world. Saint Patrick's Feast day is celebrated in other countries, particularly among the Irish Diaspora in the US, where parades are held across the country and the Chicago River is dyed green.

To attract local and overseas visitors, it is important that the branding/marketing is kept simple; for example, straplines such as 'Homeland of Saint Patrick', 'Saint Patrick's First Church', 'Saint Patrick's Burial Place' should be promoted.

In October 2011, a Saint Patrick Tourism Development Plan was launched by Margaret Ritchie, MP for South Down. *"This plan concentrates on 'Patrick' related tourism and seeks to identify further steps in Downpatrick's journey towards being known, across Ireland and the world, as the home and hub of St. Patrick tourism"* (Margaret Ritchie, MP). The Plan outlines actions to make sites more accessible and enjoyable. It also notes the need for a co-ordinated approach to tourism development and the need for a consistent narrative around the story of Saint Patrick, allowing local stakeholders to be ambassadors in their approach to Saint Patrick's Heritage.

Ensure Synergies are created between existing Marketing Campaigns

It is evident that there is a great deal of literature and promotion relating to Saint Patrick's Heritage. To ensure the best and most efficient use of resources, marketing campaigns should be linked, where possible, to ensure that duplication is reduced and synergies maximised. As noted above Tourism Ireland has launched a marketing campaign in 2011 to include global promotion of Saint Patrick. Owners/Operators of Saint Patrick heritage assets should be made aware of the promotional methods used in the campaign and provided with the opportunity to support and take advantage of the outcomes of the campaign.

Investment in Trail Development

It is essential that the Saint Patrick's Heritage sites meet/exceed visitors' expectations. To ensure this level of satisfaction, it is important that sites are accessible with appropriate infrastructure in place to facilitate bus and walking/pilgrim tours, thereby connecting the sites,

Information relating to each site should be available in one source (e.g. brochure) and detailed information should be available at individual sites, to include facts and legends associated with the heritage product. A lot of this information is available; however it would require collation and developed into a tourist-friendly brochure/guide and information points at each site location, presented as a consistent brand.

Further investment into archaeology excavation is required at various sites, which will hopefully uncover additional artefacts. These artefacts can be presented either at the site or in Saint Patrick's Centre, which will reinforce the authenticity of the experience for visitors.

Ensure promotion of the 'Trail Product' as a tourism asset

There are common best practice approaches which emerged from the development and promotion of Trails in other parts of Ireland (e.g. Saint Patrick's Trail, Carlow and Croagh Padraig Heritage Trail, West Mayo) and further afield (see Annex III), to include:

- Develop one-stop information website - to provide a centralised information point e.g. provide visitor information on: accommodation providers, transport/car hire, maps, tours, guides, and activities etc.
- Develop a Trail festivals and events programme.
- Ensure that the Trail product is presented as an integrated set of places to visit and link closely with accommodation and restaurant/beverage facilities.
- Invest in effective marketing and associated product development e.g.
 - Introducing cycle hire
 - Developing and marketing public transport access to trails
 - Introducing events and festivals to the trail
 - Encouraging retail promotions based on the trail
 - Developing trail based books, CDs and tapes, calendars, mugs, T-shirts etc.
 - Introducing new themes to the trail
 - Working with tour operators to bring in long distance visitors
- Develop a Trail Partnership, which could act as a fund raiser, a marketing organisation, a lobbying group and/or a think tank.
- Develop 'Friends of Trail', user groups, and groups of people who help maintain the trails – effective use of promotion via word of mouth.

By developing the above infrastructure and a co-ordinated approach, promotion has the potential to convert day trippers to overnight visitors, as tourists will have a range of sites and activities to maintain their interest. Adequate hotel accommodation is required to reap the benefits, which is currently lacking in Downpatrick.

In March 2010, NITB and key partners involved in Saint Patrick and Christian Heritage tourism took a learning journey to Santiago de Compostela in Spain (800km - traditional route to the alleged tomb of St James the Apostle) to find out about providing a world class Christian heritage visitor experience. According to NITB's Annual Report this journey identified best practice and provided a positive learning experience for all who attended. Many new and inspiring practices were identified and it is hoped they will help enhance the Saint Patrick visitor experience.

It is important that local and international best practice is reflected in the development of Saint Patrick's Heritage Trail in order to realise the full economic benefits.

Monitoring Visitor Feedback

Based on visitor numbers reported for Saint Patrick's Centre, the decline of 26% in one year is a cause for concern in terms of the Centre's viability. Further investigation is required, which may involve a survey of visitors to gain feedback on the visitor experience, where any issues identified can be addressed.

On-going monitoring of visitors experience would help to improve tourism offerings across all Saint Patrick related attractions.

Furthermore, improvement in the monitoring of visitor numbers is required, as information is not collated for a number of sites (Refer to gaps in information in Annex I). Although collecting visitor numbers this may not be practical in some cases, where there are opportunities to monitor footfall, it should be gathered, as it will provide operators with data to measure performance. For instance, the data reported for Saint Patrick's Cathedral (Roman Catholic) and Saul Church indicates that visitor numbers are low (i.e. 10,000 and 13,179 respectively) in comparison to nearby sites (e.g. Saint Patrick's Cathedral (Church of Ireland) attracted 40,000 visitors in 2010 and Saint Patrick's Centre attracted 120,755 visitors in 2009). Given that Saul Church is Saint Patrick's First Christian Church

in Ireland, the monitoring data indicate that there is untapped potential in terms of tourism, which should be further exploited to generate economic impact for the area.

Enhance Cross-border Partnerships

Based on a review of the various websites relating to Saint Patrick, it is apparent that a visitor to Ireland, who would have little or no knowledge of the patron saint, the information would prove confusing and disjointed. Although the Saint Patrick's Centre and NITB have wide-ranging information on Saint Patrick and the various visitor sites within NI there is little/no connection or mention of any sites in Rol (e.g. Croagh Patrick, Co. Mayo; Lough Derg, Co. Donegal; Hill of Slane, Co Meath; Rock of Cashel, Co Tipperary; Saint Patrick's Cathedral Dublin). In the dedicated Saint Patrick's Trail website, again there is no/limited reference to other sites and trails throughout Ireland to include: Saint Patrick's trail in Carlow, a trail of Croagh Padraig and various others.

There is a need for information and tourism products to be a more 'joined up' both within NI and on a cross-border basis in order to provide the visitor with a clear sense of Saint Patrick's life across the whole Island of Ireland. This may include;

- Creating an all-island Saint Patrick website promoting the patron Saint of Ireland and the associated heritage sites and trails;
- Encouraging tour operators in the North to signpost visitors to extend their visit to the South and vice versa; and
- Promoting heritage links that should be on a partnership basis (i.e. to include relevant churches, local authorities and tourism bodies) as a combined tourism product.

A holistic approach is a lot more attractive to the visitors from the USA, GB and Australia, these being key target markets for 'Tourism Ireland'.

5. Conclusions

Saint Patrick's Heritage has benefitted from significant public sector investment for high profile tourism projects, which has enhanced tourism in NI. Furthermore, Tourism Ireland is undertaking a global Saint Patrick's heritage promotion to capture the attention of potential holidaymakers, media and travel trade around the world, in particular Irish Diaspora.

The promotion of Saint Patrick and Christian Heritage will generate income and employment as a result of increased visitor numbers which in turn will stimulate local investment thereby generating economic and social benefits for the whole community. Key areas of social benefit derived from future investment and promotion may include:

• Increasing Civic Pride & Well-being

Saint Patrick's Heritage Trail has the potential to create international status for NI. Preserving this heritage will generate confidence in the local areas and promote civic pride. Saint Patrick also creates an authentic and memorable experience for local people who can take ownership of activities and events associated with Patrick's life and work, this enthusiasm and knowledge can be bestowed to other visitors, which will enhance the visitor experience.

The social value of built and cultural heritage contributes to a strong sense of place, with historic buildings and monuments being so common place to many NI towns, villages and countryside thus making them attractive places to live. This encourages community harmony, health and well-being which lead to a better quality of life.

It can create opportunities for social interaction and brings together a wide-range of individuals for personal and business purposes e.g. craft/ souvenir providers, local artists, and other social economy businesses.

- **Celebrating Culture & Heritage**

Saint Patrick Centre, Down County Museum and other sites have played an important part in educating communities and school children about the unique role Patrick can play in bringing traditions together.

By protecting historic sites along Saint Patrick's Trail will ensure that these assets will be maintained for future generations to appreciate.

The legends associated with Saint Patrick provide the community with a sense of identity and a shared history. The legends also provide an interesting tourism product in which to promote Irish folklore, thereby attracting visitors resulting in increased visitor spend and investment in the area, benefitting the wider community.

- **Enhanced Community Relations**

Saint Patrick reputedly brought Christianity to Ireland in the fifth century. Celebrating Saint Patrick represents an opportunity for enhanced community relations as he represents one people / ancestry nationally and globally with a shared heritage. However, traditionally community relations have been strained as Saint Patrick is generally not celebrated by the Unionist community in NI. Saint Patrick Day celebrations have been contentious. Down District Council takes charge of NI's biggest Saint Patrick's Day cross-community carnival parade, which attracts around 30,000 spectators. It is important that this parade remains cross-community in nature in order to create a cohesive, shared society.

Community education programmes facilitated through the Saint Patrick's Centre, Down County Museum and other attractions as well as in schools, will extend knowledge and increase the tolerance of the shared heritage of Saint Patrick amongst communities, challenge stereotypes, allow young people to learn about their shared culture and bring people together to work towards a better future and common goal.

- **Increasing Cross-border Partnership**

Promoting Saint Patrick as a combined tourism product across the island of Ireland will enhance cross-border relationships.

Annex I: Saint Patrick's Heritage Sites

Map Key	Historic Asset	Trail Interpretive Themes	Description	Link with Saint Patrick	Ownership	Visitors	Target Audience	Fee
Armagh Cluster								
1.	St Patrick's Cathedral (Church Ireland) Armagh	St Patrick's Life	Saint Patrick founded his main church here on the Hill of Armagh in 445AD. There has been a Christian church on the site ever since. It is a modest building with monuments and an 11th-century carved stone high cross.	<ul style="list-style-type: none"> St Patrick founded Ireland's first stone church on this site in 445 Joint witness with RC Cathedral for St. Patrick's Day service 	Church of Ireland	40,000 Yr 2010	<ul style="list-style-type: none"> Patrick Pilgrims Education Groups Overseas Domestic Visitors 	Adults £3 Children & Students free 25+people £2
2.	St Patrick's Cathedral (Roman Catholic)	St Patrick's Life	This twin-spired cathedral, on an elevated site, was started in 1840, but work was suspended during the Irish Famine of 1845-48. Work recommenced in 1854 when J McCarthy was appointed architect. It was dedicated for worship in 1873 but the magnificent interior decoration was not completed until early in the 20th century. The cathedral was finally consecrated in 1904.	<ul style="list-style-type: none"> Foundation stone laid on St. Patrick's Day in 1840 Altar, stained glass window, the medallion. Tradition of St. Patrick and carrying the fawn 	Arch Diocese of Armagh	10,000 Yr 2010	<ul style="list-style-type: none"> St Patrick Pilgrims Congregation and Local Residents Overseas Domestic Visitors Education Groups 	Free
3.	Armagh County Museum	Pre-Christian Ireland	Armagh County Museum is Ireland's oldest county museum. It includes archaeological material from the tombs of Ireland as well as artefacts reflecting Armagh's role in early Christian Ireland	<ul style="list-style-type: none"> Pre-Christian / pre- Patrick Ireland and the founding of Armagh on the 'Hill of Armagh' 	Armagh City & District Council	15,336 Yr 2010	<ul style="list-style-type: none"> Local Residents Education Groups Families Domestic Visitors 	Free
4.	Armagh Public Library	St Patrick's Legacy	One of the oldest libraries in Ireland, established in 1771 by Archbishop Robinson. In addition to the Archbishop's personal library which contains 17th and 18th century books on a wide range of subjects, there are many rare and valuable books such as incunabula, first editions, and illuminated manuscripts. The Library is also a registered museum and holds prints, ancient Irish artifacts, gems, coins, as well as other objects. It also holds material of early Christian heritage.	<ul style="list-style-type: none"> Book of Armagh Connor paintings Early prayer bell 	Armagh City & District Council	4,262 Yr 2009	<ul style="list-style-type: none"> Patrick Pilgrims Education Groups Special Interest Groups Local Residents 	Free
5.	St Patrick's Trian Visitor Centre	St Patrick's Legacy	Saint Patrick's Trian is a visitor complex located in the heart of the historic Cathedral City of Armagh. The centre derives its name from the ancient division of Armagh City into three distinct districts, or 'trains' (pronounced 'tree-an'). The Complex incorporates three major exhibitions. 'The Armagh Story' traces the story of Armagh's development from the	<ul style="list-style-type: none"> Touch screen audiovisual exhibition and themed exhibition 	Armagh City & District Council	43,000 Yr 2008	<ul style="list-style-type: none"> Patrick Pilgrims Families Education Groups Overseas Domestic Visitors 	Child £3.75 Concession £4.50 Family £15.75 Group Adult £4.50 Group

Study of the Economic Value of Northern Ireland's Historic Environment - Saint Patrick's Heritage

Map Key	Historic Asset	Trail Interpretive Themes	Description	Link with Saint Patrick	Ownership	Visitors	Target Audience	Fee
			stone monuments of pagan times, through to the coming of Saint Patrick and Celtic Christianity, to the modern day City. 'Patrick's Testament' takes a closer look at Ireland's patron saint through the writings found in the ninth century manuscript 'The Book of Armagh'; one of Ireland's most precious historical documents and currently housed in the Library of Trinity College Dublin. The final exhibition reflects the author Jonathan Swift's associations with the area.					Senior Citizen £3.75 Group Youth £3.95
16.	Armagh Franciscan Friary	-	Armagh Franciscan Friary was founded by Archbishop Patrick O' Scannail in 1263/64. It had prominent patrons in the city and the Franciscans played an important part in the city's religious life until the Friary was suppressed in 1542 with the dissolution of the monasteries under Henry VIII. It is the longest monastery in Ireland. The Friary is located at the south-east edge of Armagh and can be found at the entrance to the Palace Demesne.	<ul style="list-style-type: none"> Christian Heritage 	Armagh City & District Council	No Data Available	<ul style="list-style-type: none"> Education Groups Special Interest Groups Local Residents Christian Heritage Groups 	Free
17.	Cardinal Tomás Flaherty Memorial Library And Archive	St Patrick's Legacy	A unique cultural and historical resource, the Library is a free, independent public reference library, which houses important collections relating to Irish history, the Irish language and Irish literature, ecclesiastical history, the Irish abroad, and Irish sport.	<ul style="list-style-type: none"> Christian Heritage Links to the RC Cathedral Abstract statue of St Patrick 	Armagh City & District Council	No Data Available	<ul style="list-style-type: none"> Patrick Pilgrims Researchers Genealogists Historians 	Free
18.	Craigavon Museum	St Patrick's Legacy	Craigavon Museum Services boast a wide collection of research material and objects which illustrate the history and local heritage of the area.	<ul style="list-style-type: none"> The site is part of the Christian Heritage Trail 	Craigavon Museum Service	1,366 Yr 2008	<ul style="list-style-type: none"> Patrick Pilgrims Local Residents Education Groups Families Domestic Visitors 	
21.	Dromore Cross	-	Dromore Cross once stood in the town marketplace and was a gathering point for people to listen to travelling preachers, until it was damaged during religious disturbances in the 17th century. In 1887, a subscription was raised to restore what remained of the granite Cross and move it to its current site close to the Cathedral	<ul style="list-style-type: none"> Christian Heritage Links to the Dromore Cathedral 	Dromore Cathedral	No Data Available	<ul style="list-style-type: none"> Local Residents Education Groups Families Domestic Visitors 	Free

Study of the Economic Value of Northern Ireland's Historic Environment - Saint Patrick's Heritage

Map Key	Historic Asset	Trail Interpretive Themes	Description	Link with Saint Patrick	Ownership	Visitors	Target Audience	Fee
29.	Seagoe (Saint Goghans)	-	The town land and parish of Seagoe derive their name from 'SuidheGobhan', the seat of Gobhan. Gobhan was a saintly man, who according to tradition had set up a monastery on the banks of the River Bann in Iveagh in Ulster and was leader of a thousand monks.	<ul style="list-style-type: none"> Christian tradition in the area from the 6th century 	Church Of Ireland	No Data Available	<ul style="list-style-type: none"> Local Residents Historians Education Groups Families Domestic Visitors 	Free
'Downpatrick Cluster'								
7.	Down Cathedral & St Patrick's Grave	St Patrick's Life	Down Cathedral is a Church of Ireland cathedral. It stands on the site of a Benedictine Monastery, built in 1183. Saint Patrick's remains are buried in the graveyard.	<ul style="list-style-type: none"> The Cathedral is close to where it is believed that the remains of Patrick are buried A place of pilgrimage for followers of the faith of Patrick Downpatrick is near to St Patrick's point of arrival in Ireland (Saul) and to his place of death (Raholp) Stained glass window depicts scenes from the life of Patrick 	Church Of Ireland	49,858 Yr 2008	<ul style="list-style-type: none"> St Patrick Pilgrims Worshippers Overseas Domestic Visitors 	Donation
8.	Down County Museum	St Patrick's Mission	The Museum's mission is to enhance appreciation of the history, culture and environment of County Down. Situated in the Georgian County Gaol, Down Museum (est. 1981) holds an important collection of Early Christian objects and artefacts, including carved stone crosses. It also provides works of art, commemorative material and publications relating to the Patron Saint of Ireland.	<ul style="list-style-type: none"> None directly, but Downpatrick hosts major celebrations on St Patrick's Day every year and it is one of the busiest dates in the museum's calendar, when they can receive between 2,000-3,500 visitors Sculptures and carvings relating to St Patrick and with relevance to early Christianity 	Down District Council	34,716 Yr 2008	<ul style="list-style-type: none"> St Patrick Pilgrims Wide appeal, especially families, accessible site, good for large touring groups 	Free
9.	The Saint Patrick Centre	St Patrick's Legacy	£6.2 million St Patrick Centre was opened in late 2000, funded by Millennium lottery money. This is the only permanent exhibition in the world dedicated to telling the story of St Patrick. A series of interactive displays allow visitors to explore how St Patrick's legacy developed in early Christian times and reveal the artwork and metalwork which was produced during this Golden Age. Daisies Cafe, which opened at the centre in November 2009, provides employment for those with a mental illness or learning disability.	<ul style="list-style-type: none"> Gateway to St Patrick's stories and sites across Ireland It is a central hub on the new Saint Patrick's Trail through counties Armagh and Down 	St Patrick's Centre Trust	89,483 Yr 2010	<ul style="list-style-type: none"> St Patrick Pilgrims Wide appeal, especially families and special interest groups, accessible site, good for large touring groups 	Adults £4.95 Children £2.55 Concession £3.35
10.	Inch Abbey	St Patrick's Legacy	This Cistercian Abbey was founded by John de Courcy in 1180, who led the 1177 Anglo-Norman invasion of East Ulster. The ruins are set located beside the River Quoile, with	<ul style="list-style-type: none"> The place where Jocelin wrote a life of Patrick in the 12th century 	Heritage & Environment Service	1,000 Yr 2005	<ul style="list-style-type: none"> St Patrick Pilgrims Local Residents Families Education Groups 	Free

Study of the Economic Value of Northern Ireland's Historic Environment - Saint Patrick's Heritage

Map Key	Historic Asset	Trail Interpretive Themes	Description	Link with Saint Patrick	Ownership	Visitors	Target Audience	Fee
			distant views towards de Courcy's cathedral town of Downpatrick. De Courcy commissioned a monk, Jocelin to write a life of St Patrick.				<ul style="list-style-type: none"> Domestic Visitors 	
11.	Saul Church	St Patrick's Life	Two miles outside Downpatrick, this church was built in 1932, to commemorate Saint Patrick's first church in Ireland. Close by, on the crest of Slieve Patrick is a huge statue of the saint.	<ul style="list-style-type: none"> The place where Patrick first preached Stained glass window showing Patrick 	Church of Ireland Down Parish	13,179 Yr 2009	<ul style="list-style-type: none"> St Patrick Pilgrims Education Groups Independent Travellers 	Free
12.	Struell Wells	St Patrick's Life	The complex of buildings at Struell Wells, near Downpatrick, Co. Down, is the most extensive at a holy well in Ireland. It comprises two wells, two bathhouses and the ruins of a church. Nearby is a natural rock feature known as St Patrick's Chair. The site seems to be unique in that bathing in the wells constituted an integral part of the rituals performed by pilgrims.	<ul style="list-style-type: none"> Patrick blessed the wells when he arrived in Down He sang psalms and spiritual songs in the 'tub' Chair or bed of St Patrick (large stone) is found on the brow of the hill (associated with penitential ring surrounding it and bathing in wells) 	Environment & Heritage Services	No Data Available	<ul style="list-style-type: none"> St Patrick Pilgrims Special Interest Groups Education Groups Overseas and Domestic Tourists 	Free
20.	Dromore Cathedral & High Cross	St Patrick's Mission	The Cathedral stands on the site where Saint Colman built his first church of 'daub and wattle' around 514AD.	<ul style="list-style-type: none"> Christian Heritage Links to the Dromore High Cross 	Church of Ireland	No Data Available	<ul style="list-style-type: none"> St Patrick Pilgrims Education Groups Overseas and Domestic Visitors 	Free
28.	St Patrick's Stone, Coney Island	St Patrick's Life	Lying 1km off shore from Maghera Country Park, the island has a rich history spanning many centuries, with evidence of human occupation dating back 8000 years BC. One of the most westerly outposts of the Normans during their occupation of Ireland from 12th Century. Regular boat trips on the Trostan are available at the weekend from Maghera Country Park	<ul style="list-style-type: none"> This is traditionally a spot where St. Patrick rested when he visited the island in the 5th Century 	National Trust	No Data Available	<ul style="list-style-type: none"> St Patrick Pilgrims Education Groups Overseas and Domestic Visitors 	Free
'Bangor Cluster'								
13.	Grey Abbey	St Patrick's Mission	The ruins of a Cistercian abbey founded in 1193 by Affreca, wife of John de Courcy, parkland setting, medieval style 'physick' garden, Visitor centre.	<ul style="list-style-type: none"> Early Christian heritage link to Patrick and other saints 	Ni Environment Agency	10,134 Yr 2010	<ul style="list-style-type: none"> Education Groups and Overseas Domestic Visitors Families 	Free
14.	Bangor Abbey (Church Ireland)	St Patrick's Mission	St Comgall founded the Abbey in 558AD and it grew to become one of the most important seats of learning in Ireland, with almost 3,000 monks at the time of Comgall's death in 601AD.	<ul style="list-style-type: none"> Engraved glass screen in tympanum of tower represents legend of St Patrick's vision of Vallis Angelorum (Valley of the Angels, where Patrick is said to have rested - Bangor subsequently established) 	Church of Ireland	1,500 per Year	<ul style="list-style-type: none"> St Patrick Pilgrims Education Groups Congregation and Local Residents 	Free

Study of the Economic Value of Northern Ireland's Historic Environment - Saint Patrick's Heritage

Map Key	Historic Asset	Trail Interpretive Themes	Description	Link with Saint Patrick	Ownership	Visitors	Target Audience	Fee
15.	North Down Museum	St Patrick's Mission	This building once was the stable, haylofts, stores and laundry of Bangor Castle, built by Robert Ward in 1852. Its displays bring to life the history and archaeology of North Down from early Christian times to present.	<ul style="list-style-type: none"> Patrick prophesied Comgall's birth and the foundation of the abbey Christian Heritage reconstruction of early monk's cell 	North Down Borough Council	54,257 Yr 2010	<ul style="list-style-type: none"> St Patrick Pilgrims appeal, especially families, accessible site, good for large touring groups 	Free
22.	Hollywood Priory	-	Hollywood's rich ecclesiastical heritage is represented today by its most distinctive building, the Old Priory. The site is a monastery founded by St. Laisaran in the early 7th Century. The present ruins are 12th century Anglo-Norman Augustinian Abbey built by Thomas Whyte and much of these ruins remain.	<ul style="list-style-type: none"> 7th century Christian Heritage 	Church Owned	No Data Available	<ul style="list-style-type: none"> Local Residents Education Groups Domestic Visitors 	Free
26.	Movilla Abbey	-	As important as Bangor, Movilla was associated with Saint Finian of the 6th-century. As with many early monasteries, it was refounded as an Augustinian abbey in the Norman 12th century. It possesses the best collection of 13th Century coffin lids with foliate lids, in the Province.	<ul style="list-style-type: none"> Christian Heritage 	Church Of Ireland	No Data Available	<ul style="list-style-type: none"> Local Residents Education Groups Domestic Visitors 	Free
27.	Nendrum Monastic Site	St Patrick's Mission	Nendrum Monastery, was founded with the blessing of Saint Patrick in the sixth century. The ruins are on an island accessible by bridges, with dry stone walls, heavenly views and a guide and site display.	<ul style="list-style-type: none"> Founded by St Machaoi with blessing of St Patrick in the 6th C 	Ni Environment Agency	10,561 Yr 2008	<ul style="list-style-type: none"> Overseas and Domestic Visitors Education Groups Special Interest Groups Walkers Independent Travellers Recreational Visitors 	Free
'Newry Cluster'								
6.	Bagenal's Castle	St Patrick's Life	A Cistercian Monastery founded in Newry in 1153. In 1550 the land was acquired by Nicolas Bagenal who demolished the Abbey and built a fortified house known as Bagenal's Castle. Today the building is home to a number of exhibitions including a set of robes from the order of Saint Patrick.	<ul style="list-style-type: none"> No direct link but Cistercian Abbey foundation is legacy of Patrick's work 	Newry & Mourne District Council	28,554 Yr 2007	<ul style="list-style-type: none"> Education Groups Local Visitors 	Free

Study of the Economic Value of Northern Ireland's Historic Environment - Saint Patrick's Heritage

Map Key	Historic Asset	Trail Interpretive Themes	Description	Link with Saint Patrick	Ownership	Visitors	Target Audience	Fee
23.	Kilbroney Graveyard	St Patrick's Mission	'CillBhrónaigh', or Bronagh's Church (12th century), is located in the graveyard just outside Rostrevor on the Hilltown Road. The graveyard contains Saint Bronagh's Cross, dating from the late 8th century and a ruined well' said to cure eye and throat ailments. Saint Bronagh's Bell, from the 6th century is displayed in the local Catholic Church in Rostrevor.	<ul style="list-style-type: none"> Christian Heritage 	Dromore Diocese	No Data Available	<ul style="list-style-type: none"> St Patrick Pilgrims Education Groups Overseas Domestic Visitors 	Free
24.	Killeavy Old Churches	St Patrick's Mission	This site at the foot of SlieveGullion contains back to back churches; the West Church dates from 11th Century and the East Church from 15th Century. It is also the site of an early monastery founded by St. Moninna in 517 as one of the most important monasteries for nuns in Medieval Ireland.	<ul style="list-style-type: none"> St Moninna was an early missionary, reputedly directed by St Patrick to take her mission to Scotland 	Arch Diocese of Armagh	No Data Available	<ul style="list-style-type: none"> St Patrick Pilgrims Specialist interest 	Free
25.	Kilnasaggart Stone	St Patrick's Mission	'CilnaSaggart' means the 'church of the priest'. Standing at almost 2m tall, Kilnasaggart Inscribed Stone is regarded as being one of the oldest inscribed stones in Ireland. It stands on the ancient road which ran from Tara in County Meath and through the Moyry Pass to Dunseverick Head on the North Antrim Coast (<i>Sighe/Mídhlaichtra</i>).	<ul style="list-style-type: none"> Christian Heritage 	Environment Agency	No Data Available	<ul style="list-style-type: none"> St Patrick Pilgrims Specialist interest 	Free
19	Donaghmore High Cross	St Patrick's Mission	Donaghmore High Cross stands in the grounds of the Church of Ireland parish church, as a symbol of the continued Christian worship in the area for over 1500 years.	<ul style="list-style-type: none"> Christian Heritage 	Church of Ireland	No Data Available	<ul style="list-style-type: none"> St Patrick Pilgrims Education Groups Overseas Domestic Visitors 	Free

Annex II: The Economic Value of the Independent Museum Sector

Using the rationale developed in a report entitled 'The Economic Value of the Independent Museum Sector' by DC Research on behalf of the Association of Independent Museums (AIM) in June 2010, it is now possible to assess three ways in which the Museum contributes to the local economy based on local data:

1. **Tourism Impact:** This expresses the impact of visits to a museum in terms of the economic value to its local economy.
2. **Employment Impact:** This expresses the impact of a museum's employees in terms of the economic value to the local economy.
3. **Impact of Spend on Goods and Services:** This expresses the impact of a museum's spending on goods and services in terms of the economic value to the local economy.

1. **Tourism Impact -** The Tourism impact is measured by multiplying the number of local visitors by the average 'spend per local visitor' calculated for Northern Ireland (£21.50), the number of day visitors by 'spend per day visit' (£42.99), and the number of overnight visitors by 'spend per night' (£39.69). (Figures provided by DC Research). Summing these three values up provides the total gross economic impact of visitors to the museum.

Down County Museum had 34,299 visitors in 2010, of whom 26,067 were adults (often accompanied by children). The museum survey shows that 47% are local visitors, 30% day trippers and 23% overnight visitors.

Local visitors: $12,252 \times £21.50 = £263,418$

Day trippers: $7,820 \times £42.99 = £336,182$

Overnight visitors: $5,995 \times £39.69 = £237,942$

Total gross visitor impact of £837,542 in the local economy in 2010.

2. **Employment impact -** Down District Council currently employs 12 FTE staff in the Museum. In order to calculate the wider impacts of employment at the museum, the total number of FTE staff needs to be applied to a formula that takes account of deadweight, leakage, displacement and multiplier factors.

This can be expressed as follows: Net wider economic impacts of employment (i.e. Indirect and Induced Employment) = number of FTE staff x (1-deadweight (0.25)) x (1- Leakage (0.15)) x (1-displacement (0.25)) x Multiplier (1.2)).

Indirect and induced jobs = $12 \times (1-0.25) \times (1-0.15) \times (1-0.25) \times 1.2 = 7$

Total direct, indirect and induced employment value in local economy of 19 jobs.

3. **Impact of Spend on Goods and Services -** Down County Museum spent £111,900 on supplies and services in the last financial year, including maintenance, equipment, stationery, exhibitions, publicity, education, outreach projects, events, conservation, photography, publications, specimen purchases and shop stock for sale.

In order to calculate the wider economic impact of the museum's spend on goods and services, the total value of spend on goods and services needs to be applied to a formula that takes account of deadweight, leakage, displacement and multiplier factors (see Key Terms and Definitions below).

This can be expressed as follows: Net wider economic impact of spend on goods and services (i.e. Indirect and Induced Spend) = spend on goods and services x (1- deadweight) x (1-leakage) x (1-displacement) x Multiplier).

Down County Museum is a medium-sized museum and is of considerable significance to the local service economy, spending £111,900 in the last financial year.

Indirect & induced spend = $£111,900 \times (1-0.25) \times (1-0.5) \times (1-0.25) \times 1.2 = £37,766$

Total direct, indirect and induced spend of £149,666.

Annex III: Benchmarking (NI / ROI / GB)

- **Saint Patrick's Trail, Carlow** – trail takes in the county's two largest urban settlements of Carlow and Tullow. Both towns have a rich ecclesiastical tradition and were in the forefront of the nineteenth-century revival of Catholic places of worship and education
- **Croagh Padraig Heritage Trail, West Mayo** – The Croagh Patrick Heritage Trail (61kms) is an accredited national Way Marked Way and is part a countrywide network of high quality walks. West Mayo and includes outstanding heritage sites and many features of great natural beauty. It crosses the foothills of Croagh Patrick but does not include the ascent to the summit.
- **Causeway Coast Route** – The Coastal Route covers eighty miles of coastline across two counties, beginning in Belfast in the south-east of Antrim and ending in the Walled City in County Derry–Londonderry. The route incorporates three Areas of Outstanding Natural Beauty (AONB) and part of a fourth i.e. Antrim Coast and Glens (including Rathlin Island); Causeway Coast; North Derry; and Sperrin (northern section). The signed tourist driving trail, launched in 2007, is a key project within the 'Causeway Tourism Masterplan' (2004-2013) which has greatly enhanced the appeal of the destination by shifting visitor perceptions from a single focus on the Giant's Causeway towards the wider appeal of a scenic coastal visitor trail
- **The Ring of Kerry** – is part of a mystical and unspoilt region of Ireland that offers a large range of outdoor pursuits, beaches, and ancient heritage of Ireland e.g. Iron Age Forts, Ogham Stones, old monasteries, and landscapes carved out of rock by the last Ice Age.
- **The Kingfisher Trail** – bridges the Irish border through counties of Fermanagh, Monaghan, Cavan and Leitrim. A cycle route bringing together cross border communities in peace, reconciliation and tourism development
- **Robert Burns Tourism in Scotland** – The focus of the product is the Robert Burns National Heritage Park in Alloway⁴ and the Dumfries area⁵ which are more than a one-hour drive apart and connected by a Burns Heritage Trail. There is also a project in progress known as the "Distributed National Burns Collection Project" which aims to identify and link Burns-related opportunities and collections in Scotland.
- **Parrett Trail** – a speciality trail from a river source to mouth, in Somerset, England, featuring specially created art works reflecting local life and habitats.
- **Pennine Way** – running from the Scottish Border to The Peak District.
- **C2C Trail** – a Sustrans cycle trail from the west coast of England at Workington to the east coast at Newcastle.
- **Camel Trail** – in Cornwall - Britain's first rail trail, and an important local income generator with over 500 hire bikes on its 30 km route.
- **Tarka Trail** – in Devon - a successful figure 8 trail with heavy tourist use. Uses a rural rail route for part of the way

International

- **Garden Route in South Africa** – a world-renowned coastline driving route linking a large variety of landscapes, towns, attractions, and leisure activities from Heidelberg to the Tsitsikamma Forest and Storms River.
- **Pacific Drive in California** – The Pacific Coast Highway (officially designated California Highway 1) is a popular tourist 485-mile route between San Francisco and Los Angeles. The route offers a range of attractions, destinations and dramatic coastal scenery
- **Camino Santiago** – The Way of Saint James is the traditional route to the alleged tomb of St James the Apostle and has been the focus of pilgrimages for the past 1,000 years. The route in Spain alone is 800km long and takes 4-6 weeks to walk.

NITB and key partners involved in Saint Patrick and Christian heritage tourism took a learning journey to Santiago de Compostela in Spain in March 2010 to find out about providing a world class Christian heritage visitor experience. According to NITB's Annual Report this journey identified best practice and provided a positive learning experience for all who attended. Many new and inspiring practices were identified and it is hoped they will help enhance the Saint Patrick visitor experience.

CAUSEWAY COASTAL ROUTE CASE STUDY



Contents

1. INTRODUCTION	1
2. BACKGROUND	1
3. ECONOMIC BENEFITS.....	8
4. SOCIAL BENEFITS	11
5. BENCHMARKING	12
6. CONCLUSIONS	14

1. Introduction

This case study provides an overview of the ‘Causeway Coastal Route’ as an example of Northern Ireland’s natural and built heritage contributing to tourism.

2. Background

The Coastal Route covers 80 miles of coastline across two counties, beginning in Belfast in the south-east of Antrim and ending in the Walled City in County Derry-Londonderry (Refer to Figure 1 for a map of the coastal route and key historic assets). The route covers eight District Council areas in the north-east and north-west of Northern Ireland i.e. Ballymena, Ballymoney, Carrickfergus, Coleraine, Larne, Limavady, Moyle and Newtownabbey.

The route incorporates three Areas of Outstanding Natural Beauty (AONB) and part of a fourth i.e. Antrim Coast and Glens (including Rathlin Island); Causeway Coast; North Derry; and Sperrin (northern section).

According to the Causeway Glens and Heritage Trust (CCGHT)¹, there is a wealth of scheduled monuments and historic monuments within the Causeway Coast and Glens to include over 2,000 listed buildings and 11 conservation areas including the coastal villages of Glenarm, Carnlough, Cushendall, Cushendun and Ballycastle. Other unique settlements include: Ballymoney; Carrickfergus, Merville Garden City, the Moravian village of Gracehill, the Victorian railway town of Whitehead and the village of Bushmills with its famous distillery. The most popular visitor attraction is the Giant’s Causeway which attracts almost 500,000 visitors each year.

The ‘*Giant’s Causeway, Antrim and Causeway Coast*’ has been designated as a ‘Signature Project’ by the Northern Ireland Tourist Board (NITB) as part of its ‘Tourism in Northern Ireland, A Strategic Framework for Action 2004-2007’. Signature Projects² have been identified for their potential to deliver world-class excellence, drawing visitors from home and overseas.

A framework for the development of tourism has been devised as part of the ‘Causeway Tourism Masterplan’ (2004-2013). The Masterplan has the following key objectives to:

¹ The Causeway Coast and Glens Heritage Trust (CCHHT) was established as a partnership organisation in 2002 with a primary role to promote and enhance the unique qualities of the Causeway Coast and Glens region.

² NITB’s five signature projects include: The Walled City of Derry; Giant’s Causeway, Antrim and Causeway Coast; Titanic (Maritime); St Patrick & the Christian Heritage; and the Mourne National Park

- Increase the number of tourists visiting the area;
- Achieve a co-ordinated approach to tourism in the area;
- Spread the benefits of visits attracted by the Giant's Causeway to a wider geographical area*;
and
- Develop strong attractions elsewhere in the area.

*The signed tourist driving trail, launched in 2007, is a key project within the Masterplan which has greatly enhanced the appeal of the destination by shifting visitor perceptions from a single focus on the Giant's Causeway towards the wider appeal of a scenic coastal visitor trail.

Figure 1: Map of the Causeway Coastal Route



Key	
1.	Belfast
2.	Carrickfergus Castle*
3.	Glenarm Castle & Walled Garden*
4.	Glens of Antrim & Glenariff Forest Park
5.	Carrick-a-Rede Rope Bridge*
6.	Giant's Causeway & Visitor Centre*
7.	Dunluce Castle*
8.	Downhill Demesne & Mussenden Temple*
9.	Roe Valley Country Park
10.	Derry-Londonderry

*Key Heritage Sites

The key heritage and cultural assets, in rank order according to the number of visitors, is presented below. *Please note that visitor numbers reported have been sourced from the Northern Ireland Tourist Board's Northern Ireland Visitor Attraction Survey (Jan - Dec 2010). The entrance fees have been sourced from the individual operators. The revenue has been calculated based on the assumption that 66% of visitors are adults and 34% are children, as per the profile of visitors reported in the NI Visitor Attraction Survey 2010.*

Giant's Causeway & Visitor Centre

(2 miles east of Bushmills)

Asset: The Giant's Causeway is Northern Ireland's only World Heritage site and one of only three in Ireland. It is also classified as an Area of Outstanding Natural Beauty and National Nature Reserve. The site comprises approximately 40,000 hexagonal stone columns left by volcanic eruptions 60 million years ago.



Ownership: National Trust.

Description/Use: The Giant's Causeway is open to the public via the visitor centre. The previous visitor centre was destroyed by fire in 2000 and temporary facilities are currently in operation.

Investment: The development of the new Giant's Causeway Visitor Experience is currently underway at a cost of £18.5 million³ with a proposed completion date of summer 2012. The new development aims to create a new visitor centre, café, enhanced walking trails and access, state of the art interpretation, enhanced parking, i.e. c.370 car parking spaces at the site and a further 96 in a near-by park and ride facility, and will ensure the conservation and protection of this site.

Tourism: In 2010, the Giant's Causeway attracted **464,195 visitors**, which is on par with that achieved in 2005. However it represents a decrease of 35% from the previous year. This decrease in visitors may be due to the on-going construction work and reduced parking facilities and/or as a result of the economic downturn which has adversely affected tourism. Upon completion and promotion of the new facilities and visitor experienced, the number of visitors is expected to increase. Table 1 presents an overview of visitor numbers and estimated revenue

Table 1: Giant's Causeway visitors and estimated revenue (2005-2020)

	2005	2006	2007	2008	2009	2010	Total
Visitors	464,243	553,063	712,714	751,693	714,612	464,195	3,660,520
Estimated Revenue*	£696,365	£829,595	£1,069,040	£1,127,539	£1,071,918	£696,293	£5,490,750

**Based on admission fee of £6 per car assuming 4 people per car.*

Nb. Admission rates will change from summer 2012 onwards where a per head charge for access to the new facilities will apply

³ Funders include: £9.25m through NITB of which EU Competitiveness is contributing £6.125m; £3m Heritage Lottery Fund; and £6.25m National Trust (of which £2.25m is through fundraising activity).

Carrick-a-Rede Rope Bridge

(White Park Rd Ballintoy)

Asset: Carrick-a-Rede Rope Bridge is a rope suspension bridge near Ballintoy, County Antrim that was traditionally erected by salmon fishermen. The geology, flora and fauna have won Carrick-a-Rede recognition as an area of special scientific interest.



Ownership: The National Trust

Description/Use: The rope bridge offers visitors the unique experience to traverse a 30m deep and 20m wide chasm with views across to Rathlin Island. Guided tours are available to groups if pre-booked. A tea room and shop offering souvenirs is also available on site.

Tourism: This site attracted **238,227** visitors in 2010. Although the number of visitors has decreased slightly (1.5%) from the previous year, it represents 44% increase from 2005 figures. Table 2 presents an overview of visitor numbers and estimated revenue.

Table 2: Carrick-a-Rede Rope Bridge visitors and estimated revenue (2005-2020)

	2005	2006	2007	2008	2009	2010	Total
Visitors	165,000	184,904	222,613	241,291	241,856	238,227	1,293,891
Estimated Revenue*	£772,530	£865,721	£1,042,274	£1,129,724	£1,132,370	£1,115,379	£6,057,998

**Based on fees of £5.60 per adult, £2.90 per child.*

Carrickfergus Castle

(Marine Highway, Carrickfergus)

Asset: Carrickfergus Castle, established in 1178, is one of Northern Ireland’s most famous monuments and Ireland’s best preserved Norman Castle. Apart from its initial construction, there have been a number of alterations to the castle over the course of its history. After use as a prison in the 18th century it was further strengthened and served as a magazine and armoury until 1928.



Ownership: Northern Ireland Environment Agency.

Description/Use: Open to the public with the following visitor facilities on offer: Visitor centre; Guided tours; Audio-visual theatre; Hire facilities; Gift shop; Educational packages; Special events/demonstrations; and Interpretative models.

Tourism: The Castle attracted **69,792 visitors** in 2010. Although the number of visitors has decreased slightly (3%) from the previous year, it represents 28% increase from 2005 figures. Table 3 presents an overview of visitor numbers and estimated revenue.

Table 3: Carrickfergus Castle visitors and estimated revenue (2005-2020)

	2005	2006	2007	2008	2009	2010	Total
Visitors	54,502	55,158	54,683	63,283	71,961	69,792	369,379
Estimated Revenue*	£135,710	£137,343	£136,161	£157,575	£179,183	£173,782	£919,754

**Based on fees of £3 per adult, £1.50 for under 16's.*

Downhill Demesne & Mussenden Temple

(1 mile west of Castlerock)

Asset: Mussenden Temple is situated within the grounds of Downhill Castle on the top of a 120-foot cliff. Mussenden Temple was also built by the Bishop of Derry as a summer library in 1783. The architecture of Mussenden Temple was inspired by the Temple of Vesta in Tivoli, near Rome.



Ownership: The National Trust.

Description/Use: This attraction offers visitors the chance to explore the landscaped park at Downhill Demesne with its sheltered gardens and cliff walks. Downhill Demesne is a large ruin of the palatial house built around 1780 by Frederick Hervey, Earl of Bristol and Bishop of Derry.

Tourism: This site attracted **23,494 visitors** in 2010, representing a decrease of 22% from the previous year. NB. Records for visitor numbers per 2009 were not available. Table 4 presents an overview of visitor numbers and estimated revenue.

Table 4: Downhill Demesne and Mussenden Temple visitors and estimated revenue (2005-2020)

	2005	2006	2007	2008	2009	2010	Total
Visitors	-	-	-	-	30,000	23,494	53,494
Estimated Revenue*	-	-	-	-	£112,050	£87,750	£199,800

**Based on fees of £4.50 per adult, £2.25 per child.*

Dunluce Castle

(2 miles east of Portrush)

Asset: Dunluce Castle is a 17th century castle located on a headland at the tip of the north Antrim Coast. There is evidence that parts of the castle date back to the 14th century, although the first record of it is from 1513. The 17th century mainland court contains domestic buildings leading downhill to the narrow crossing to the rock, formerly protected by a drawbridge to the Gatehouse. Earthworks to the west of the castle are remains of a town whose ruined church stands in the graveyard south of the castle, separated from it by the Coast Road.



Ownership: Northern Ireland Environment Agency.

Description/Use: The site includes a visitor centre, shop and guided tours of the ruins, gardens and remnants of the town.

Tourism: The Castle attracted **10,526 visitors** in 2010. The number of visitors has steadily decreased from 2005, with a 18% reduction evident, based 2010 figures compared to 2005. Table 5 presents an overview of visitor numbers and estimated revenue.

Table 5: Dunluce Castle visitors and estimated revenue (2005-2020)

	2005	2006	2007	2008	2009	2010	Total
Visitors	13,119	12,915	11,725	7,096	12,903	10,526	68,284
Estimated Revenue*	£17,317	£17,048	£15,477	£9,367	£17,032	£13,894	£90,135

**Based on fees of £2 per adult and free admission for children.*

Glenarm Castle & Walled Garden

(Castle Lane Glenarm)

Asset: Glenarm Castle is the ancestral home of the Earls of Antrim and has been in existence since the 13th Century. Until the middle of the eighteenth century the Antrim Estate extended up the coast to Dunluce Castle, Ballycastle and beyond. However, following the Irish Land Acts in the late 19th century, the Estate is now mostly limited to the land that sits within the walls of the Castle Demesne. The Walled Garden is one of Ireland’s oldest walled gardens. Originally created to supply the Castle with its fruit and vegetables, the Walled Garden is now filled with flowers and specimen plants.



Ownership: privately owned by Alexander McDonnell, 9th Earl of Antrim.

Description/Use: The Walled Garden and tea room is open to the public from May until the end of September. Guided Tours of the castle are also available. Glenarm Castle and Walled Garden hosts

the following festivals: Cultural & Heritage Open Days (Part of the Dalriada Festival Week in July); Annual Tulip Festival; and Summer Craft Fair.

Tourism: This site attracted **12,000 visitors** in 2010, representing a 40% decrease from previous years. NB. Records for visitor numbers per 2007 were not available. Table 6 presents an overview of visitor numbers and estimated revenue.

Table 6: Glenarm Castle and Walled Garden visitors and estimated revenue (2005-2020)

	2005	2006	2007	2008	2009	2010	Total
Visitors	-	-	20,000	20,000	20,000	12,000	72,000
Estimated Revenue*	-	-	£74,700	£74,700	£74,700	£44,820	£268,920
<i>*Based on fees of £4.50 per adult, £2.25 per child.</i>							

Annex I provides an overview of other built and natural assets along the coastal route.

3. Economic Benefits

One of the main industries in the area is tourism. The most popular attraction is the Giant's Causeway which attracts almost 500,000 visitors each year. Tourism is an important employer throughout the area but particularly on the North Coast.

The Causeway Coast and Glens Tourism Partnership is the Regional Tourism Organisation (RTO) responsible for marketing the area through collaboration between 400 local businesses⁴, the NITB and the local authority areas of Ballymena, Ballymoney, Carrickfergus, Coleraine, Larne, Limavady, Moyle and Newtownabbey. The Partnership also works in association with the CGHT, which is responsible for natural and sustainable tourism.

The collaborative approach to marketing creates a strong brand for promoting the region in its entirety.

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.

Salient points to note include:

- Visits and visitor expenditure are unevenly distributed in the region, with Coleraine reporting the largest proportion of visitors (i.e. 35% of visits in the area and 9.8% of the total visitors to NI) and associated expenditure (i.e. 42% of expenditure in the area and 11.7% of the total tourism spend in NI). This area includes the seaside resorts of Portstewart, Portrush and Ballycastle, which accounts for the volume of tourists to the area.
- The Giant's Causeway, the third most visited site in NI, is located in Moyle local authority and therefore this area accounts for the second largest proportion of visitors. Moyle is the only local authority that has reported an increase across all these measures; to include a 13% increase in visitors; 3% increase in bed nights; and 29% increase in visitor spend.

⁴ Businesses include a range of sectors, all benefiting from tourism, including accommodation, visitor attractions, restaurants, tour guides, ferries, airlines, public transport, community groups, tour operators, golf clubs, activity providers.

- Half (4/8) of local authorities have experienced an increase in the number of visitors from the previous year.
- Only one local authority (i.e. Moyle) reported an increase in the number of nights. NB. A weakness highlighted by the Causeway Tourism Masterplan (2004-2013) is the scarcity of four-star accommodation within the region and a lack of leisure opportunities within the hotels, which may be adversely affecting the number of nights that visitors stay in the area or indeed to convert day trippers to overnight visitors.
- Encouragingly, five of the eight local authorities recorded an increase in the level of spend in 2009 when compared to the previous year.

Table 7 summarises the tourism performance in the region in 2009.

Table 7: Tourism Performance - Causeway Coast and Glens region (2009)

	Trips (000)	% of NI	% change from '08	Nights (000)	% of NI	% change from '08	Spend (£m)	% of NI	% change from '08
Causeway Coast & Glens (2009)									
Ballymena	87.8	2.8	+6%	409.5	3.9	-28%	13.4	2.6	-14%
Ballymoney	19.3	0.6	-6%	79.7	0.8	-36%	2.6	0.5	-23%
Carrickfergus	59.5	1.9	-9%	189.6	1.8	-25%	9.1	1.8	-20%
Coleraine	306.6	9.8	-1%	1,017.9	9.6	-7%	59.4	11.7	+9%
Larne	102.9	3.3	+5%	289.6	2.7	-14%	11.6	2.3	+2%
Limavady	72.8	2.3	+23%	211.8	2.0	-7%	9.8	1.9	+15%
Moyle	162.4	5.2	+13%	476.3	4.5	+3%	27.0	5.3	+29%
Newtownabbey	58.8	1.9	-13%	270.2	2.6	-25%	8.6	1.7	-28%
Belfast	718.9	23%	-3%	2,423.8	22.9%	-18%	128.2	25.3%	-16%
Derry	165.7	5.3%	8%	616.5	5.8%	-6%	28.9	5.7%	-2%
NI Overall	3,129.4	100	3%	10,565.6	100	-15%	507.0	100	-3%
			+105 visitors			-1,813 nights			-£15.5m

Department of Enterprise, Trade and Investment (DETI), NI Visitor Attraction Survey Jan-Dec 2010. NITB implemented a survey of around 1,500 leisure visitors and domestic holidaymakers staying in Northern Ireland (i.e. excluding day trippers), completed on-line after returning home from their recent visit. In addition, a series of more in-depth face-to-face interviews were completed with visitor and domestic leisure staying and day trippers in the Signature Project areas.

Tourism trends relating specifically to the 'Giant's Causeway, Antrim and Causeway Coast' from this survey include the following:

- Reasons for visiting Northern Ireland:
 - To visit the Giant's Causeway (76%); and
 - To enjoy the natural environment (62%).
- The Giant's Causeway and Antrim Coast and Glens attracts the highest level of visitation reported against any of the Signature Projects (SP):
 - 76% of leisure visitors reported visiting the SP area; and
 - 63% followed the Causeway Coastal Route.

- Visitors spend, is on average **£101 per trip** to the area, the highest on average for any of the SP areas.
- Visitors were primarily visitors from Great Britain (i.e. 35% from Great Britain; 23% from North America; 15% were European; 9% from the Republic of Ireland and 5% from Northern Ireland).
- Appeals to all ages, but more to younger visitors than other SP i.e. 32% of visitors are under the age of 35; 37% aged 35-54; and 31% of visitors age 55+.
- These visitors are general sightseers and culturalists who enjoyed the unique and distinctive landscapes and coast (84%), and our unique and distinctive attractions (53%), with 82% having visited a castle, house or historic monument. However, visitors are less likely to have taken a guided tour, attended a festival or event, visited a museum/art gallery or theatre/musical performance or visited a park/garden than the other Signature Project areas, highlighting the gap in the availability and/or promotion of these product offerings.
- Visitors interviewed in the Giant's Causeway and Antrim Coast and Glens found greatest appeal in being able to enjoy the environment and a range of new and unique sightseeing and cultural experiences, within close proximity. The most appealing aspect of the experience was: scenery and beautiful views; attractions/places to visit providing unique experiences; lots of interesting places in close proximity; lots of outdoor activities; roads signs to places of interest and signposted driving route to follow; quality food and drink.
- While the development of the new Visitor Centre at the Giant's Causeway will address some of these issues, weaknesses included: learning about nature/wildlife; availability of locally produced crafts; range of indoor activities; and on-site learning about people/places.
- The generally positive experience is reflected in the overall ratings i.e. 48% rated their overall experience as excellent (average of 4.35 out of 5 rating, the highest of all SPs); 37% stated that they would definitely revisit the area/project; and 85% would definitely recommend a visit to the area.
- 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 the research findings, visitors rated 'uncovering stories' relatively low compared to other SPs, identifying an opportunity to develop a unique story to tell to engage the visitor more and deliver on the perception of a unique and authentic experience. The development of the new Visitor Centre and exhibitions should provide opportunities to deliver these experiences, however, visitor attractions, tourist information centres and accommodation establishments could provide additional opportunities to deliver on these attributes in the area.

4. Social Benefits

Based on feedback from the two main councils in the area (i.e. Coleraine and Moyle), the wider benefits derived built and cultural heritage for both visitors and non-visitors include:

- 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; and
- Knowledge that those less advantaged have access to public heritage sites.

Furthermore, the Causeway Coastal Route will also contribute towards achieving the following social benefits.

• Celebrating Culture & Heritage

By protecting built heritage along the Coastal Route will ensure that the historic assets will be maintained for future generations to appreciate.

The Causeway Coast & Glens region is known for myths, and folklore (for example: the myth which emerged linking the Causeway and Scotland with a prehistoric hero Finn MacCool; The Vanishing Horsemen; Hawthorn Trees and Fairies; and the Children of Lir). These intangible assets and cultural heritage provide the community with a sense of identity and a shared history and literature, where storytelling can stimulate imagination, connect people as well as connecting them to the surrounding natural environment. The myths/storytelling also provide an interesting tourism product in which to promote the area, thereby attracting visitors resulting in increased visitor spend and investment in the area, benefitting the wider community.

• Increasing Civic Pride

Promoting the Causeway Coastal Route as a combined tourism product (i.e. creating links and synergies between built and natural heritage sites) will increase tourism and business investment in the area and thereby contributing to enhancing the image of the region and sense community well-being.

• Supporting Scientific Research/Education

The Causeway Coastal Route has significant geological importance, facilitating the interpretation of the habitats and species across 98 designated sites within the area, as referred to in Section 1.5. In particular the Giant's Causeway has been the focus of intense study of earth sciences as evidenced by the wealth of scientific literature on the site. By promoting sustainable tourism, the environment can be protected and studied for scientific and educational purposes whilst also being used as a resource to generate tourism and employment.

5. Benchmarking

CCGHT and other key stakeholders should undertake a robust benchmarking exercise of other routes, in order to reflect local and international best practice in the development of the Causeway Coastal Route in order to realise the full economic and social benefits.

Based on a high level review of other trails/routes in Ireland and further afield, there are common best practice approaches which emerged from their development and promotion, to include:

- Develop one-stop information website for the entire route - to provide a centralised information point e.g on: accommodation providers, transport/car hire, maps, tours, guides, and activities etc. *NB. The Causeway Coastal Route has a dedicated, user-friendly website (<http://www.causewaycoastandglens.com/Causeway-Coastal-Route>).*
- Ensure that the trail/route product is presented as an integrated set of places to visit and link closely with accommodation and restaurant/beverage facilities.
- Invest in effective marketing and associated product development e.g.
 - Develop a trail/route festivals and events programme.
 - Introducing cycle hire
 - Developing and marketing public transport access to trail/route
 - Introducing events and festivals to the trail/route
 - Encouraging retail promotions based on the trail/route
 - Developing trail/route based books, CDs and tapes, calendars, mugs, T-shirts etc.
 - Introducing new themes to the trail
 - Working with tour operators to bring in long distance visitors
- Develop a Trail/Route Partnership, which could act as a fund raiser, a marketing organisation, a lobbying group and/or a think tank.
- Develop 'Friends of Trails/Coastal Routes', user groups, and groups of people who help maintain the trails/routes - effective use of promotion via word of mouth.

By developing/maintaining the above infrastructure and a co-ordinated approach to promotion has the potential to convert day trippers to overnight visitors, as tourists will have a range of sites and activities to maintain their interest.

Discussion with NITB highlighted that the Ring of Kerry should be considered as a benchmark. The Ring of Kerry is part of an unspoilt region of Ireland that offers a large range of outdoor pursuits, beaches, and ancient heritage of Ireland e.g. Iron Age Forts, Ogham Stones, old monasteries, and landscapes carved out of rock by the last Ice Age.

On an international basis, NITB identified the Garden Route in South Africa, as a possible benchmark. This is a renowned coastline driving route linking a large variety of landscapes, towns, attractions, and leisure activities from Heidelberg to the Tsitsikamma Forest and Storms River. Representatives from NITB visited the Garden Route as a learning experience (EU funded), where lessons could be gained and applied to the Causeway Coastal Route.

Annex II provides an overview of the Ring of Kerry and the Garden Route in comparison to the Coastal Route, in terms of: key sites; visitor numbers/trends; promotion; signage; transport; and accommodation. Salient points to note include:

Key sites

- NITB acknowledged that the Garden Route offered more in terms of sites (e.g. Safari Game Reserves, Whale Watching, etc.), which could not be translated to the Causeway Coastal Route context.
- However, it is clear to see that key sites along the Causeway Coastal Route are highly ranked visitor attractions (i.e. The Giant's Causeway and Carrick-a-Rede Rope Bridge) and can be favourably compared to similar sites on along the Garden Route and the Ring of Kerry.

Visitor numbers/trends

- Considering the top six destinations along the Causeway Coastal Route, there were 818,234 visitors in 2010, compared to 700,000 to the Ring of Kerry and between 623,000-1,197,500 in 2009 to the Garden Route.
- 'The Giant's Causeway' is the most popular visitor attraction along the Coastal Route, with 464,195 visitors in 2010. The Carrick-a-Rede-Rope Bridge is the second most popular with 238,227 visitors.
- The visitor comes away from the Giant's Causeway or the Rope Bridge with a feeling of having seen or done something different and exciting. It is clear from the visitor numbers to the Carrick-a-Rede-Rope Bridge that 'a little excitement' and the 'possibility of potential danger' in the crossing of the bridge is an attraction to the visitor. This is also the case in the Garden Route with mention of such activities as bungee jumping, shark cage diving and whale watching. It may be worth considering the introduction of bungee jumping, rock climbing etc. to the key Causeway Route attractions in order to enhance and attract new market segments (i.e. high impact sport seeking tourist) to the area.

Promotion

- Based on successful marketing campaigns, the following rankings should be noted:
 - The Ring of Kerry is ranked No.6 in Go Ireland's top ten places to visit in Ireland.
 - The Garden Route appears in the top 10 places to visit in South Africa.
 - The Giant's Causeway (No.7) and Carrickfergus Castle appear in Go Ireland's top ten places to see in Ulster.
- The Causeway Coastal Route, the Garden Route and the Ring of Kerry all benefit from dedicated websites, providing information for visitors relating to sites along the route.
- The Causeway Coast and Glens website provides the visitor with detailed information on the route together with event and accommodation information. In terms of improvements, more information is required on the route from Portstewart onwards i.e. towards Limivady and Derry-Londonderry. Although, there is a mention of Hezlett House and Mussenden Temple and the historic walls in Derry/Londonderry, there is a lack of information to entice the visitor to stop along the route between Portstewart and Derry-Londonderry.
- This view is supported by a review of visitor feedback from various websites/web forums and discussions with a selection of visitors who have travelled the Causeway Coastal route, where the following has been highlighted: The view that "*the route ends in Portstewart*" or that "*the best of the route ends there*"; and "*The Antrim Coast is the Coastal Route*". Consequently, it is recommended that additional efforts to enhance the visitor experience between Portstewart and Derry-Londonderry should be carried out to change this perception.

Signage and Transport

- Feedback from NITB identified that dedicated signage is apparent along the Causeway Coastal Route compared to the Garden Route. It was felt that the visitors to the Garden Route would benefit from additional signage.
- NB. The signed Causeway Coastal Route, launched in 2007, has greatly enhanced the appeal of the destination by shifting visitor perceptions from a single focus on the Giant's Causeway towards the wider appeal of a scenic coastal visitor trail.
- For each of the routes, it is acknowledged that public transport could be improved, which would generate increased visitors.

Accommodation

- NITB have identified that there is no 4/5* hotel along the Causeway Coastal Route. The introduction of which may convert day-trippers to staying overnight in the areas, thereby enhancing economic benefits.
- NITB noted that key officials responsible for the promotion of the Garden Route undertook a study of the route to identify gaps in service provision (e.g. accommodation, transport, petrol stations, information points etc.). The resulting report identified where services should be provided to improve the visitor experience. Whilst some local authority areas did not benefit from recommendations to include funding for additional services, the approach was inclusive of all stakeholder buy-in, with the needs of visitors as the key focus.

6. Conclusions

The Causeway Coastal Route is a unique tourist product, providing tourists with the opportunity to experience an area rich in natural heritage to include dramatic landscapes and seascapes in Northern Ireland. It is evident that there is a strong brand associated with the area, which is promoted by an active RTO, the Causeway Coast and Glens Tourism Partnership.

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');
- **Develop touring opportunities** (e.g. maximise self-drive touring opportunities offered by Causeway Coastal Route by integrating fully with Walled City and Belfast);
- **Further develop environmental aspects of the experience** (i.e. development of maritime heritage opportunities; develop distinctive open air entertainment);
- **Brand messages** (i.e. ensure delivery against the significant perception of the uniqueness and authenticity of the experience and opportunities to deliver this through uncovering stories; and interpretation should maximise the opportunities for uncovering stories and learning);

- **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.

The above recommendations are consistent with those identified within the NITB's report 'The signature project experience how well do they deliver? - Giant's Causeway, Antrim and Causeway Coast Signature Project' (2010).

Annex I: Other Attractions of the Causeway Coastal Route

Listed in the table below are examples of other attractions located along the Causeway Coastal Route.

Attraction	Location	Description
Historic Sites		
Armoy Round Tower	Antrim (Armoy)	Preserved ruins of round tower that dates from approx. 460 being part of a monastery founded by Olcan a Disciple of St. Patrick
Ossians Grave	Antrim (Cushendall)	Megalithic court cairn on a hillside in Lubitavish townland, near the Glenaan River.
St. Cuthbert's Church	Antrim (Dunluce)	In close proximity to Dunluce Castle, this church was built on the site of an older medieval church in the late 1630's.
Dunseverick Castle	Antrim (Dunseverick)	A fragmentary ruin on a high crag of one of the earliest castles in Ireland.
Bonamargy Friary	Ballycastle	Remains of a Franciscan Friary founded in 1485. Interesting features include a burial vault.
O'Connor Memorial	Ballycastle	Gabled pinnacle on marble columns over arched base.
Kinbane Castle	Ballycastle	The Castle was built about 1546 on long narrow limestone promontory running out to the sea.
Ballymoney Town Hall	Ballymoney	The Town Hall was erected by public subscription in 1866. It was renovated and enlarged in 1934, and again in 2005. Inside are rooms which commemorate some of Ballymoney's most celebrated historical figures.
Old Church Tower	Ballymoney	The tower is the oldest surviving building in the town, with a date stone inscribed 1637. The church was re-built after it was burned during the 1641 Irish Rebellion and was used until 1782.
Dooley's Cairn	Ballymoney (Dunloy)	Close to the village of Dunloy is Dooley's Cairn, a Neolithic tomb dating from around 2000-4000BC.
Bishops Gate and Black Glen	Coleraine (Castlerock)	Classical Gate, which was once the main entrance to Downhill Castle, leads to Portvantage Glen. A National Trust property with a variety of trails, fish pond, car park, picnic area and toilets at Lion's Gate Car Park.
Ballycairn Mote and Bailey	Coleraine (Portrush)	Thought by some to be an ancient burial cairn re-used as a Norman fort and signalling point.
RNLI Museum	Coleraine (Portrush)	The lifeboat station was established in 1860 in Kerr Street and has an interesting history, which is detailed in the small museum now housed there.
Ballyaghan Old Church	Coleraine (Portstewart)	The Church of Agherton (Ballyaghan) was founded on a Bronze Age ritual site before 100AD. In the field beside it, towards the sea, are the remains of a court grave (c.3500BC) and an ancient signalling mound.
The Rough Fort	Limavady	Prehistoric earthworks.
Sampsons Tower	Limavady	Fortified structure of rubble and sandstone.
Limavady Union Workhouse	Limavady	Opened in 1842, the Limavady Union Workhouse is reported to be one of the best preserved buildings of its type in Ireland.
Martello Tower	Limavady (Magilligan)	A well preserved Martello Tower built during the Napoleonic Wars with walls over 9ft thick, marks the entrance to Lough Foyle.
Glens, Gardens and Parks		
'Nine Glens of Antrim'	Antrim	<p>Nine Glens of Antrim include a fifty mile shoreline, grasslands, forests, peat bogs, mountain uplands, churches and castles steeped in history and culture.</p> <ol style="list-style-type: none"> 1. Glenarm: The glen of the army. Overlooking Glenarm village, eleven miles north of Larne on the famous Antrim Coast Road. 2. Glencloy: The glen of the hedges. Two miles north of Glenarm, with the village of Carnlough at its foot. 3. Glenariff*: The arable or fertile glen. The best known of the nine, which sweeps majestically towards the village of Waterfoot. 4. Glenballyeamon: Edwardstown glen. At the foot of which is Cushendall, more or less at the centre of the nine glens. 5. Glenaan: The glen of the colts foot. Or rush lights, a rugged glen, having the site of the legendary Ossian's Grave, with the Cushendall Ballymoney mountain road. 6. Glencorp: The glen of the slaughtered. Close by Glenaan and roughly

Attraction	Location	Description
		parallel to the main road from Cushendall to Cushendun. 7. Glendun: The glen of the brown river. Adjacent to Cushendun village; spanned by a viaduct on the main Cushendall - Ballycastle road 8. Glenshesk: The sedgy glen. East of the town of ballycastle and sweeping towards the ruins of historical Bonamargy Friary. 9. Glentaisie: The Glen of Taisie of the bright sides. Roughly west of Ballycastle and, like Glenshesk, close to the town.
Glenariff Forest Park*	Antrim	Glenariff Forest Park is a 1,185 hectare (2928 acre) forest situated in Glens of Antrim, and caters for many outdoor activities including walking, caravanning, camping, horse riding, and guided walks.
Benvariden Gardens	Ballymoney	This estate has been in existence since 1630's, making it one of the oldest in Northern Ireland.
Rinnagree Coastal Park	(Coleraine) Portstewart / Portrush	Rinnagree Coastal Road offers coastal scenery and walking opportunities of the Causeway Coast Way and the Ulster Way
Swann's Bridge	Limavady	A tranquil riverside picnic area at the foot of Binevenagh Mountain on the Causeway Coastal Route.
Roe Valley Country Park	Limavady	The Roe Valley Country Park stands on the outskirts of Limavady, and offers riverside views and woodland walks. Visitor Numbers 2010 - 300,000
Historical and Cultural		
The Old Bushmills Distillery	Antrim (Bushmills)	Ireland's oldest licensed Whiskey Distillery licences in 1608 offers conducted tours and tasting
Haxlett House	Castlerock	17th Century thatched cottage, now furnished in late Victorian Style.
The Giant's Sconce	Castlerock	The Sconce is thought to be the citadel of Nial of the Nine Hostages, 5th Century founder of the O'Neill dynasty. It was originally a large circular, stone built fortress with walls 3 metres thick and chambers and tunnels within them.
Coleraine Town Hall	Coleraine	Temporary museum exhibitions take place during the year.
Camus Cross and Bullaun Stone	Coleraine	Red sandstone high cross is the only one of its type in County Londonderry / Derry and is situated in a secluded graveyard, close to the roadside.
Phoenix Peace Fountain	Coleraine	A gift from the communities of the United States to the communities of Northern Ireland. The fountain was inspired by the peace process of May 1998 in Northern Ireland and acts as a lasting reminder of America's support in the Northern Ireland peace process.
St Patricks Church	Coleraine	Located in the centre of Coleraine, on the original site of the Early Christian Church founded by St Patrick in the 5th century A.D. Part of the present church dates from 1613.
Lissanduff Ritual Site	Coleraine (Portballintrae)	An ancient water ritual site, high above the village. A pair of earthen concentric rings specially designed to retain water for ancient purposes of worship. As yet unexcavated.
Museums		
Ballycastle Museum	Ballycastle	The museum is housed in the 18th century courthouse and market building and includes the late 19th century/early 20th century Irish Homes Industries Workshop Collection, artworks by prominent artists such as JW Carey, John Campbell, Rosamund Praegar, watercolours by A Nicholl and John Nixon, the 1904 Taisie Banner from the first Glens Feis, social history material of the 19th and 20th century, Neolithic finds from Rathlin Island, Bronze Age material and a photographic and postcard display.
Ballymoney Museum	Ballymoney	Ballymoney Museum has a History Resource Area that contains information useful for genealogical research.
Carrickfergus Museum	Carrickfergus	The Museum presents an exhibition of treasure excavated in Carrickfergus. There are multi-media and audio-visual presentations.
Larne Museum	Larne	This historic building features modern displays, reflecting the distinctive history and heritage of the area.
Green Lane Museum	Limavady	Reflecting domestic and rural life from the local area, the collection includes 20th Century reference books, memorabilia, agricultural items, lace and textile samples, material from local commerce and trades and historic art.

Annex II: Comparison between the Causeway Coastal Route, Ring of Kerry and the Garden Route

Ring of Kerry (ROI)	Garden Route (South Africa)	Causeway Coastal Route
Overview		
<ul style="list-style-type: none"> • 180 km (111 miles) • Mountains • Picturesque towns • Historic sites • Outdoor pursuits • Golfing • Watersports • Cycling • Walking • Fishing • Driving tours 	<ul style="list-style-type: none"> • 250km + (155miles) • Beaches with water sports • National Parks • Safari Game Reserves • Whale watching hotspots • Caves • Ostrich Farms • Bungee jumping • Eco adventures • Shark cage diving <p>NB. Climate 9 degrees to 28 degrees</p>	<ul style="list-style-type: none"> • 129 km (80 miles) • Areas of outstanding natural beauty • Historic monuments • Listed Buildings • Conservation areas • Victorian Railway town • Giant's Causeway • Castles • Country Parks
Key Sites		
<p>Towns:</p> <ul style="list-style-type: none"> • Killarney - Ireland's main town for tourism • Ross-Maine - Picturesque area • Killorglin - • Cahersiveen - Scenic area at the foot of Beentee mountain • The Skelligs - Valentia Island and the Skellig Isles • Waterville - 'The Little Whirlpool' Premier coastal tourist centre • Caherdaniel - Village overlooking Derrynane Bay • Kenmare - Picturesque town. To the North are MacGillcuddy Reeks, rising to Carrantuohill (Ireland's highest Peak - 1,039 meters) <p>Sites: Gap of Dunloe; Bog Village; Rossbeigh; The Barracks; Derrynane House; Skellig Experience Valentia Island; Staigue Fort; Kenmare Lace; Molls Gap; Torc Waterfall; Muckross House & Gardens; The Blue Poll; Ross Castle; Ogham Stones; Various spiritual Buildings; Muckross Abbey; and Skellig Michael</p>	<ul style="list-style-type: none"> • Mossel Bay - Coastal village and harbour • Great Brak-Beaches and sports activities • George - 6th oldest town in South Africa, Outeniqua Mountain to the North • Herolds Bay - Beaches with dolphin and whale spotting • Victoria Bay - A cove enclosed by cliffs with beaches and surfing facilities. • Wilderness-Set between the Kaaimeans River and the Goukama Nature Reserve. • Sedgfield - Resort town renowned for variety of birds • Knysna - Holiday destination, forests and lagoon. • Plettenberg Bay - Otherwise known as beautiful bay • Stormsriver - known as the place of many waters, Tsitsikamma National Park located here also 	<ul style="list-style-type: none"> • Giant's Causeway and Visitor's centre • Carrick a Rede Rope Bridge • Carrickfergus Castle • Downhill Demesne & Mussenden Temple • Dunluce Castle • Glenarm Castle & Walled Garden
Visitors to Key Sites		
<ul style="list-style-type: none"> • The latest tourism statistics available from Fáilte Ireland show that in 2010 the tourism sector was estimated to be worth €4.6 billion nationally with 5.6 million foreign visitors, of which over 700,000 visited Co. Kerry and spent in the region of €160 million. • Muckross House & Gardens: 91,017 • The Skellig Experience: 27,500 • Skellig Michael: 12,343 • The Old Barracks: 2,471 	<ul style="list-style-type: none"> • The number of annual visitors to the Garden Route coast is estimated at between 623,000 and 1,197,500. (based on The Recreational Value and Use of The Garden Route Coast, South Africa report 2009 • Tsitsikamma National Park Q1 2011: 50,734 • Wilderness National Park Q1 2011: 26,844 • Mossel bay tourist Office Q1 2011: 5,323 • George tourist Office Q1 2011: 1,299 • Knysna tourist Office Q1 2011: 4,549 • Trends for Q1 2001 footfall 	<ul style="list-style-type: none"> • Giant's Causeway: 464,195 • Rope Bridge: 238,227 • Carrickfergus Castle: 69,792 • Downhill Demesne: 23,494 • Dunluce Castle: 10,526 • Glenarm Castle: 12,000 • Total above: 818,234

Ring of Kerry (ROI)	Garden Route (South Africa)	Causeway Coastal Route
	walk in for participating town on the Garden Route - Western Cape Tourism Barometer Jan-Mar 2011	
Visitor trends		
<p>Main Source Markets:</p> <ul style="list-style-type: none"> • 71% of the surveyed visitors to Killarney (Most visited town in Ireland- Key area for the Ring of Kerry tour) were from Overseas, • 28% were from the Republic of Ireland • 1% from Northern Ireland. <p>Of the Overseas Visitors:</p> <ul style="list-style-type: none"> • 25% are from North America, • 23.5% from Mainland Europe • 17% from the United Kingdom (of England, Scotland, Wales and Northern Ireland). • 6% are from either Australia or New Zealand • 3% from ‘Other Markets’ including China, Middle East & South Africa). <p>Source: Kilarney Visitor Survey 2010</p>	<ul style="list-style-type: none"> • 18% from Great Britain • 3% from USA • 2.3% from Canada • 2% from France • 5.4% from the Netherlands • 9.6% from Germany <p>Trends for Q1 2001 footfall walk in for participating town on the Garden Route - Western Cape Tourism Barometer Jan-Mar 2011</p>	<ul style="list-style-type: none"> • 35% from Great Britain • 23%; from North America • 15% were European • 9% from the Republic of Ireland • 5% from Northern Ireland <ul style="list-style-type: none"> • 32% of visitors are under the age of 35 • 37% aged 35-54 • 31% of visitors age 55+.
Promotion and awareness		
<ul style="list-style-type: none"> • Dedicated Website • A variety of other specialised website dedicated to accommodation, walking, tours, cycling • Trade fair recognition : Meitheal 2011, Ireland largest tourism trade fair • Fáilte Ireland’s Visitor Attitudes Survey 2010: visitors recommending Ireland was 88% in 2010, (23%) visitors from abroad anticipated coming back within the next year and over half of all visitors (52%) envisaged a repeat visit in the next few years. (28% of visitors in 2010 visited the Ring of Kerry) • Tourist information centres • The Ring of Kerry is No.6 in Go Ireland’s top ten places to visit in Ireland. 	<ul style="list-style-type: none"> • Dedicated Website • A wide range of websites ranging from the dedicated Garden route website to tour websites, accommodation and adventure websites. The Garden Route website promotes a wide range of tours, accommodation and business in all of the towns located on the Garden Route. • Tourist information centres • Excellent media and travel guide ratings • The Garden Route appears in the top 10 places to visit in South Africa (satourism.co.za) 	<ul style="list-style-type: none"> • Dedicated website • Causeway Tourism Masterplan 2004-2013 • Northern Ireland Tourist Board ‘Signature Project’ • Causeway Coast and Glens Tourism Partnership is responsible for marketing the area through collaboration with 400 local businesses • Visitor Centre at the Giant’s Causeway • Regional Tourist Information Centres all mentioned in ‘The Causeway Coastal Route & Glens’ brochure • Giant’s Causeway considered the main attraction. • Belfast to Porstewart considered the most famous part of the route (Trip advisor thread) • The Giant’s Causeway (No.7) and Carrickfergus Castle appear in Go Ireland’s top ten places to see in Ulster. • The ‘Lonely Planet’ guide recognised the magnificent vistas along the breathtaking Antrim coastline • The Guardian, Travel edition 2006 ranked the Coastal Route as the second most spectacular road trip in the world • Jacob’s Creek 2006 Ranked the scenic Antrim coastline as the fifth most beautiful spot in the world, just behind Sydney Opera House and Victoria Falls

Ring of Kerry (ROI)	Garden Route (South Africa)	Causeway Coastal Route
Other Activities Promoted on Website		
<ul style="list-style-type: none"> • Horse Riding • Skellig Tours • Rock climbing • Canoeing • Diving • Pony trekking • Kayaking 	<ul style="list-style-type: none"> • Knysna Forest MTB Relay • Great BrakGrabadoo • Waterfront-Heads Half Marathon • George 200 Trail Run • Engen 10km Run • Candlelight Run • Knysna Speed Festival • Rotary Cycle Tour • Forest Marathon • Fishing • Hiking • Sailing • Sky diving • Game viewing 	<ul style="list-style-type: none"> • Excursions and tours • Sea and lake fishing • Water sports • Horse riding • Activity centres • Golfing • Arts & Crafts
Signage and Public Transport		
<ul style="list-style-type: none"> • Driving or a bus tour is recommended • Kerry Airport is convenient but not well linked to public transport (Ring Of Kerry.com) • Road signs in both Irish and English 	<ul style="list-style-type: none"> • Public transport is not as well established as may be expected but it is constantly being improved. 	<ul style="list-style-type: none"> • Increase awareness of other key attractions along the route beyond Giant’s causeway is recommended • Ensure signposting from all ports is meeting visitors needs
Accommodation		
<ul style="list-style-type: none"> • The Ring of Kerry website has a wide range of B&B and self-catering accommodations. There are various links and prices. Car hire and holiday homes are also advertised. 	<ul style="list-style-type: none"> • The Garden Route website has a section dedicated to accommodation of all types. It is a very comprehensive collection of information on accommodation from hotels to budget accommodation in each town. Tourist information and events are also listed for each town or area. 	<ul style="list-style-type: none"> • A search facility is provided on the website in order to book accommodation • A wide range of facilities available from guest houses, farm houses and health spa resorts

DERRY WALLS & EBRINGTON BARRACKS CASE STUDY



Contents

1. INTRODUCTION	1
2. BACKGROUND	1
A. CITY WALLS	4
B. EBRINGTON BARRACKS.....	7
3. ECONOMIC BENEFITS	9
4. SOCIAL AND ENVIRONMENTAL BENEFITS.....	13
5. BENCHMARKING	13
6. CONCLUDING COMMENTS.....	15

1. Introduction

Derry~Londonderry is the only remaining completely walled city in Ireland, represents the last walled town of its kind to have been constructed in Europe, and is the final representation of a tradition that stretches back to the Roman Empire. As such, Derry City Walls represent a unique cultural asset.

This case study provides an overview of Derry City Walls and Ebrington Barracks as an example of historical assets contributing to tourism and regeneration in Northern Ireland.

2. Background

Derry~Londonderry is one of the six counties of Northern Ireland and is located towards the North West of the province and lies on the west bank of the River Foyle. It also sits on the border with County Donegal in the Republic of Ireland. The City has a population of 109,097¹, an increase of 3.8% from the 2001 census figure of 105,066. Derry Local Government District (LGD) has a rank of 2 out of the 26 LGDs, i.e. it is the second most deprived LGD in Northern Ireland. Furthermore i.e. 46% of the population live in the most deprived areas in Northern Ireland².

The employment and economic outlook for the City is particularly challenging. It has been estimated that in terms of employment, job levels may only recover to 2008 levels by 2017 with the recession estimated to have cost over 2,000 jobs³. As stated in Ilex's mission for regeneration, the Regeneration Plan (2011-2015) aims to meet the challenges which the City currently faces though providing economic, physical and social renewal.

The Regeneration Plan has identified five Transformational Themes underpinned by a series of eleven Catalyst Programmes through which the Plan is to be delivered. The total capital cost of delivering all the projects proposed is in excess of £450m⁴. The Regeneration Plan projects a

¹ Northern Ireland Statistics and Research Agency (NISRA), population estimates 2008

² Northern Ireland Multiple Deprivation Measures (May 2010)

³ Context and Baseline Report: Derry-Londonderry - today or tomorrow, Oxford Economics, February 2010.

⁴ Capital budget of over £104m has been identified already for capital investment, therefore an estimated £402m is required to be raised over the 10 year period to finance the remaining programmes in the Regeneration Plan. In addition, there is an estimated £333m of investment in recurrent funding over the life of the Regeneration Plan. A budget of £75m has been identified leaving a recurrent funding requirement of approximately £258m over the period of the Regeneration Plan.

significant positive impact can be achieved through the delivery of renewal in the City by 2020. The key projected benefits for the City include:

- Significant increase in the number of people able to work;
- 12,900 net additional jobs by 2020 and 16,300 jobs by 2030;
- £500m of additional Gross Value Added (additional wages and profits) to the Derry-Londonderry economy by 2020 rising to £800m in 2030; and
- Improvements to the Derry-Londonderry fiscal balance by £185m on 2020 relative to the Baseline.

The City will host the UK City of Culture in 2013, a year-long celebration of culture, which will contribute to meeting the above regeneration targets.

Derry~Londonderry boasts two key historical assets, which are the focus of this case study: its 17th century defensive City Walls and Ebrington Barracks, a former army base built in 1841, measuring 26 acres. The locations of these assets are highlighted in Figure 1.

Figure 1:
 Location of 'City Walls' and Ebrington Barracks



Source: Investment Brochure 'A Competitive Connected Creative and Caring City' – Ilex & Derry City Council

a. City Walls

Asset: The City Walls (Figure 2, overleaf), built from 1613-1618 define the limits of the original planned settlement. They are a distinctive townscape feature, and are of major public interest.

Ownership: Department of the Environment.

Description: The City Walls are the largest monument in state care in Northern Ireland and is the only completely walled city remaining in Ireland.

The four original gates to the Walled City are Bishop's Gate, Ferryquay Gate, Butcher Gate and Shipquay Gate. Three further gates were added - magazine Gate, Castle Gate and New Gate. The Walls vary in width between 12 and 35 feet and are 1.5km in circumference.



The 'Walled City of Derry' has been designated as a 'Signature Project' by the Northern Ireland Tourist Board (NITB) as part of its 'Tourism in Northern Ireland, A Strategic Framework for Action 2004-2007'. Signature Projects⁵ have been identified for their potential to deliver world-class excellence, drawing visitors from home and overseas.

Following its designation as a Signature Project, a Public Realm Plan⁶ was commissioned as a means of expressing a vision for the conservation, development and management of the Walled City. In addition to providing an overall framework for the regeneration of the Walled City, this Public Realm Plan included recommendations such as visitor orientation, Gateway signage and a lighting strategy for the walls, bridges and historic building as well as key public spaces.

Investment: According to the 'Investing in the One Plan for Derry~Londonderry 2020'⁷, £4.1m funding has been secured under the 'Built Heritage Programme' for the restoration of the most important historical buildings located within the core Walled City (Refer to Figure 2.2 and Table 1.2). This programme is being led by Derry City Council, NITB, NIEA and property owners/promoters. A further £9.5m has been secured by Derry City Council for the Restoration of the Guildhall, located just outside the city walls.

The mission of the One Plan is to deliver:

"Renewal, Economic, Physical and Social benefits - building a stronger and more vibrant economy with increased prosperity for our City and region, in ways which ensure that opportunities and benefits from regeneration are targeted towards the most deprived groups in our communities"

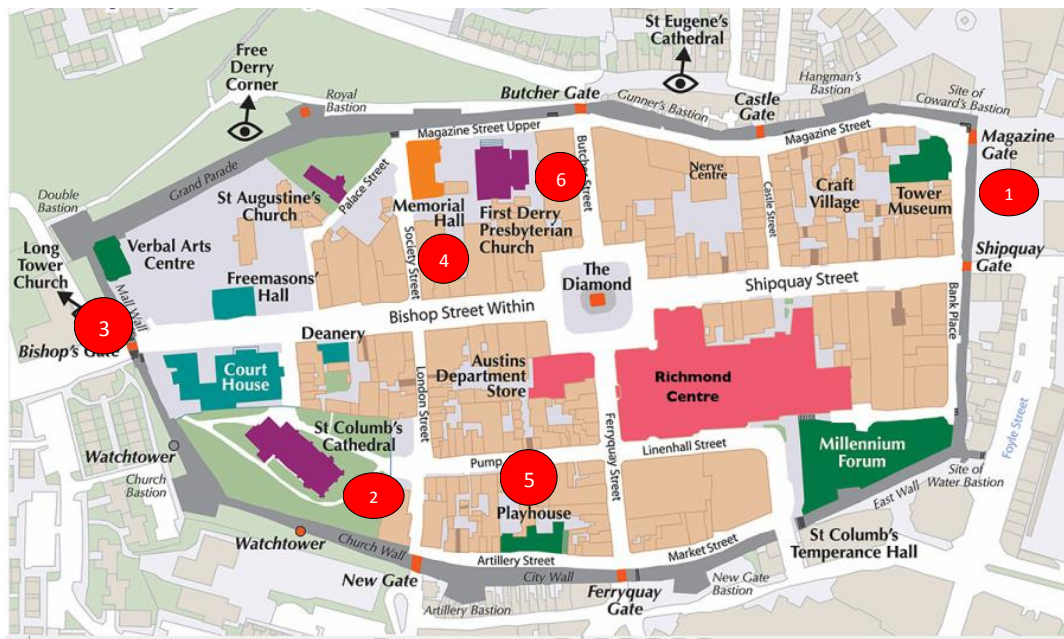
Figure 2 illustrates the location of the historic buildings funded under the Built Heritage Programme and the Guildhall. Table 1 provides a description of these buildings, their use, the number of visitors and the revenue generated from those historic assets which charge admission.

⁵ NITB's five signature projects include: The Walled City of Derry; Giant's Causeway, Antrim and Causeway Coast; Titanic (Maritime); St Patrick & the Christian Heritage; and the Mourne National Park

⁶ Derry City Council, Department for Social Development - Walled City of Derry Public Realm Plan (May 2004)

⁷ Ilex Urban Regeneration Company Limited, Investing in the One Plan for Derry-Londonderry 2020, Final Report Issued 31 August 2011

Figure 2: Map of Derry Walls & Location of Built Heritage Programme Assets



Source: <http://www.richmondcentre.co.uk/maps-of-the-city.html>

The combined number of visitors to the main historic assets within the City Walls in 2010 was at least 192,312. Three of the six heritage buildings are still undergoing restoration, therefore the full tourism potential has not been realised. The buildings are not-for-profit making organisations and therefore the majority do not charge an entry fee, and those who do, only charge a small fee where the revenue generated is reallocated to the restoration and maintenance of the building.

A Walled City Lighting Strategy⁸ has been developed which aims to illuminate these key historic buildings, the surface and selected elevations of the Historic City Walls, as well as the Craigavon Bridge. The work is expected to be complete by mid-2012. The project will not just illuminate the sites mentioned, but will seek to enhance the evening economy and provide a safer environment.

Table 1: City Walls – Historic Assets

Key	Historic Asset	Description	Visitors
1	The Guildhall/Harbour Museum/Guildhall Square (Grade A) (Restoration on-going)	The Guildhall was built in 1887 in a neo-Gothic style, to honour the London guilds which had financed the new city almost three hundred years' earlier. It sits within a prominent location on the edge of the Walled City and represents a landmark building due to its architectural heritage and the civic function that it performs and the Mayor's Office and City Council Chamber. Use: The building is open to members of the public but there can often be limited access due to Council meetings and events taking place there. The building is of interest to visitors due to its history, the events that have taken place there (most notably the Bloody Sunday Inquiry), the architecture, stained glass windows, oak panelling, ornate ceilings and concert organ, and the four faced clock tower. In the next 12-18 months the vision is to enhance public	Guildhall Visitors: Not recorded Entry Charge: Free

⁸ 'Walled City of Derry, Lighting Strategy, Survey and Strategy Document' February 2007 – Equation Lighting Design Ltd et al. NB. The Walled City Lighting Strategy has been developed by Derry City Council, and a number of partners including Northern Ireland Tourist Board, Ilex and the Northern Ireland Environment Agency (Built Heritage Division).

Study of the Economic Value of Northern Ireland's Historic Environment -
Derry Walls & Ebrington Barracks

Key	Historic Asset	Description	Visitors
		<p>access by relocating meetings rooms for civic functions to the upper ground level and opening up the lower ground level as an exhibition space. This space will become the 'arrival hub'/tourist information source for visitors. To celebrate the 400 year anniversary of the Walls in 2013, an exhibition will be located in the Guildhall. This is a timely exhibition as it coincides with the City of Culture 2013 events.</p> <p>The Harbour Museum located in the former harbour commissioner's offices (beside Guildhall) which were built in 1882. Use: It is the headquarters of the Heritage & Museum Service of Derry City Council – located in the former harbour commissioner's offices which were built in 1882. The exhibitions narrate the city's maritime history using early maps, drawings and artefacts</p>	<p>Harbour Museum Visitors: 2009: 3,980 2010: 4,748 +19 Entry Charge: Free</p>
Built Heritage Programme – Listed Buildings			
2	<p>St Columb's Cathedral, London Street (Grade A)</p> <p>(Restoration complete)</p>	<p>Built in 1633, St Columb's is the oldest building within the walled city and regarded as the most historic building. Use: The museum contains a chalice of 1613 and artefacts from the siege of 1688-89. Restoration of St. Columb's Cathedral commenced in February 2010 and was completed in June 2011. The Cathedral is now fully reopened and tours of the Cathedral and Chapter House Museum have resumed. The Cathedral is the most visited attraction in Derry, attracting over 70,000 visitors each year</p>	<p>Visitors: 2009: 81,346 2010: 73,564 -10% Staffing: 1 x 4 days per week 2 x 3 days per week Entry Charge: Fees will be introduced in 2012 (Standard £2 & Concession £1.50)</p>
3	<p>St Columb's Church 'Long Tower' (Grade B+)</p> <p>(Restoration on-going)</p>	<p>St Columba's 'Long Tower' was the first Catholic Church and occupies the site of a monastery founded by St Columba in 546. The foundations of the building started in 1748 lie under the present church that was extended and remodelled in 1909. Use: The building is open to members of the public.</p>	Data not available
	<p>Aras Colmcille - listed building in the grounds of the Long Tower Church (Grade B)</p> <p>(Restoration on-going)</p>	<p>It is the second oldest national school in Derry and was begun before the National Schools' Act of 1831. It is the oldest surviving purpose-built primary school in the city. It was refurbished in 1894 and functioned as a school until the late 1970s.</p>	N/A
4	<p>Apprentice Boys Memorial Hall, Upper Magazine Street</p> <p>(Restoration on-going)</p>	<p>The Apprentice Boys of Derry was established to commemorate the siege of Derry in 1689 when the Apprentice Boys closed the city gates against the army of King James II. Use: The Memorial Hall is used as a meeting hall and a museum which holds a significant number of historical artefacts and memorabilia from the siege and on the history of the Apprentice Boys.</p>	<p>Visitors: 2009: 19,500 2010: 14,000 -28% Entry Charge: £2 Revenue: £28,000 (2010) Staffing: 1 FTE & 3 volunteers</p>
5	<p>The Playhouse, Artillery Street (Grade B+)</p> <p>(Restoration complete)</p>	<p>The Playhouse operates from two adjoining buildings at 5-7 Artillery Street, Derry. The buildings were originally built in 1911 and 1890 respectively as schools. Use: The facility is a multi-disciplinary Community Art Resource Centres and is involved in variety of activities including theatre production, visual art exhibitions, plays, community arts programmes and education programmes and resources.</p>	<p>Visitors: 2010/11 est – 100,000 NB. 30,000 people also supported through outreach work Entry Charge: Generally free. However, theatre events/shoes range from £5-12 Revenue: Not provided Staffing: 11 FTE, 9PTE, 12 Casual staff</p>

Study of the Economic Value of Northern Ireland's Historic Environment -
Derry Walls & Ebrington Barracks

Key	Historic Asset	Description	Visitors
			and 10 volunteers.
6	First Derry Presbyterian Church (Grade B+) (Restoration complete)	Built in 1690 on the site purchased with Queen Mary's donation to reward Presbyterian loyalty during the siege of 1689. Use: Re-opened following major repairs in May 2011 to address structural damage due to dry rot, it comprises a sacred space, visitors centre and exterior historic trail travelling backwards from 2011 - 1642.	Data not available

b. Ebrington Barracks

Asset: Ebrington Barracks ('Ebrington') – former army base, measuring 26 acres, was built in 1841 in the shape of a star with buildings on three sides overlooking the city and the River Foyle.



Ownership: The barracks closed in 2002 and the land transferred to the ownership of the Office of First and Deputy First Minister (OFMDFM). Ilex Urban

Regeneration Company was formed with responsibility for the development of Ebrington.

Location: situated on the east bank of the River Foyle in the city of Derry~Londonderry in the north-west of Northern Ireland. The site is directly across the river from the traditional city centre. A physically linked has just been created via £13.4m Peace Bridge, which was officially opened in Spring 2011. The east bank of the city surrounding Ebrington constitutes the neighbourhood of the Waterside.

Description: Ebrington is of value for its architectural design and for the survival of much of this design into the modern period. It is a walled barracks complex opposite a walled city. The centre piece of the site is the Star Fort⁹ (Scheduled Ancient Monument), which will act as a major heritage and cultural landmark and tourist attraction in the city. A total of 14 buildings have been listed by the Northern Ireland Environment Agency (NIEA), which surround the Parade Ground on three sides.

Investment: According to the 'Investing in the One Plan for Derry~Londonderry 2020', £23m capital has been allocated to development at Ebrington from OFMDFM over the next 5 years from 2011 to 2015.

Uses: The Ebrington Masterplan (October 2006) proposes that the listed buildings be refurbished to form an arts and culture cluster, interspersed with cafés, bars and restaurants to provide a continental-style piazza. Furthermore, the Parade Ground is being designed as a space for major outdoor events/concerts, which will be sectioned into four performance space, which collectively have the capacity for 15,000 people. According to Ilex, approximately 100,000 sq m of space in new and existing buildings will be created and that the proposed mix for the site is estimated to be: Commercial offices and enterprise: 25% to 50%; Leisure/Culture/Community/Tourism: 10% to 40%; Residential: 25% to 50%; and Retail/restaurants, etc.: 10% to 20%.

⁹ The actual site of the Star Fort is the former Strongs' Orchard, the site used by Jacobite forces in 1689 to bombard the city during the Siege of Derry.

The 14 listed historic buildings in Ebrington are summarised in Table 2, together with the proposed use after restoration. The heritage value relates to the fact that the buildings are integral to the original architectural composition of the fort and their relationship to the other buildings around the square/parade.

Table 2: Ebrington – Listed Buildings

Listed Buildings	Description & Heritage Value	Proposed Use
Parade Ground - former Officers Quarters (Building No. 63)	Two storey three bay Georgian style house. It is an integral part of the original composition of the fort. It contributes to this architectural group and to the proportion and unity of the parade ground. It is visible to the city across the river.	To be determined
Parade Ground - Clock Tower/Soldiers' Quarters (Building Nos. 67/68/69)	The rendered central three storey block with clock tower. It is the central part of the architectural composition around the square. It is part of the original design. It is a key landmark to the city particularly the central tower. Its details contribute to its historic appearance. The military history of the building an important component part of the site.	Gallery
Parade Ground (Building No. 71)	The former Officers mess. Two storey three bay Late Victorian architrave detail around windows absent from other buildings on the site. Flat roofed projecting porch. It is an integral part of the original composition of the fort. It contributes to this architectural group and to the proportion and unity of the parade ground. It is visible to the city across the river. Its interior complements the design of the building and is integral to an understanding of its history. The military history of the building is an important component part of the site.	City of Culture office already occupied
Parade Ground – Former Guardhouse (Building No. 10/10a)	Two storey rendered building with gable to the parade ground located opposite the former officers' mess. Incorporating former jail block to the rear. It is of historic value due to its external appearance of the building including colonnade and footpath, and historic remnants in the interior particularly a granite stair in the former jail. Its relationship with other buildings around the square.	To be determined
Parade Ground - Britannia House (Building No. 17)	The former barrack masters house later Admirals House. Three storey rendered building over basement with south west bastion as garden. It is of historic value as it is an integral part of the architectural composition of the fort. The façade of the building is designed to be seen from across the river and complements the general unity of the base in its simplicity.	Heritage/sensory centre
Cunningham Block (Building No.4)	A two storey gabled building in whinstone with sandstone and brick trims. It is of historic value due to its external appearance of the building. Surviving interior detail. The building contributes to the architectural and historic character of the base at the Limavady Road Entrance. It is the key representative building of the expansion southwards in the 1870s. As the drawing office it may have been heavily involved in the development of anti- submarine devices during the Second World War.	Restaurant
Officers' Mess (Building No. 85)	Two storey brick Victorian building built in 1903. It is of historic value as it is a good example of a standard type of officer's mess building. Its late date and its exclusion from the parade square are significant as are its location on high ground and at the original entrance to the base.	Boutique hotel
Barrack Building (Building Nos. 80/81)	Two storey brick barracks buildings joined at gables of a standard military type. It is of historic value due as these buildings make a very strong contribution to the townscape of the base as it forms the street behind the original fort along with the officers' mess.	Incubation centre for the creative industries
Barrack Building (Building No. 79)	Two storey brick barrack building a standard military type. This building constructed on the former northeast bastion makes a strong contribution to the townscape of the base at this point. It is of historic value as it is suitably large scale it forms the backdrop to the original fort buildings on views from the city, and is complimentary to the setting of the buildings along the road behind.	Offices
Former hospital (Building No. 49)	Three storey rendered Building. It is of historic value as it is a key part of the original composition of the fort which gives scale and presence to views of the complex. It contributes to the proportion and unity of the parade ground.	Maritime museum

Study of the Economic Value of Northern Ireland's Historic Environment -
Derry Walls & Ebrington Barracks

Listed Buildings	Description & Heritage Value	Proposed Use
Parade Ground – Former stores (Building Nos. 45/46)	Two rendered, two storey gables presented to the parade ground. It is of historic value as it is an integral part of the architectural composition of the fort. The building also contributes to the proportion and unity of the parade ground. Its side elevation is presented to the city and is important in its simplicity for contributing to the unity of appearance of the base. The military history of the building is an important component part of the site.	Public Archive
Parade Ground ('The Canteen') NW bastion, (Building No. 40)	Two storey rendered rectangular building between edge of parade ground and river fortifications. It is of historic value due as it is an integral part of the original composition of the fort. The sudden drop of ground levels and awkward entrance from the square to the north bastion add visual interest. The military history of the building is an important component part of the site.	Restaurant and café/bar - views over the river
Barrack Building (Building No. 104)	Two storey brick barrack building a standard military type. It is of historic value as it a building constructed on northern boundary road bastion makes a strong contribution to the townscape of the base at this point. The building forms the backdrop to views eastwards along this road, and is complimentary to the setting of the other buildings along the road.	High profile, prestigious office accommodation
Barrack Building (formerly family quarters) (Building No. 117)	This building is of historic value as it is an unusual brick barrack building with cast iron colonnade supporting an external first floor walkway and overhanging roof. This building is an example of a standard type of married soldiers quarters built by the Army in the late nineteenth century when soldiers families were introduced to barracks for the first time.	Suitable for re-development as residential apartments

Source: Ebrington Barracks Conservation, Environment & Heritage Service (July 2003) & Ebrington Master Plan, Illex (2006) & Investing in the One Plan for Derry~Londonderry 2020, Illex (August 2011) & Stakeholder Consultations with Illex and Derry City Council representations

3. Economic Benefits

Tourism Performance

According to NITB's "Local Authority Tourism Estimates", Derry only receives 5.3% of visitors, 5.8% nights and 5.7% of spend, even though the proportion of trips, nights and spend have increased relative to other local authority areas from 2008 to 2009 (See Table 3). Despite its status as Northern Ireland's second city, its unique Walled City and close proximity to the border, it is clear that there is still considerable untapped potential for Derry to further develop its tourism industry.

For example, total visits to Derry equate to only 23% of the number of tourists to Belfast. It is expected that tourism offering will be greatly enhanced (see events listed overleaf) in the coming years as the city will host the first ever UK City of Culture in 2013 and will be the host port in the final leg of the Around the World Clipper Yacht Race in July 2012. According to NITB, six new hotels will be built in the City, and a further two hotels are currently seeking planning permission, such is the projected demand.

Table 3: Out of State Visitors 2008-2009

2009	Trips (Thousands)	%	NIGHTS (Thousands)	%	SPEND (£ Million)	%
Belfast	718.9	23.0	2,423.8	22.9	128.2	25.3
Derry	165.7	5.3	616.5	5.8	28.9	5.7
NI	3,129.4	100	10,565.6	100	507.0	100
2008	Trips (Thousands)	%	NIGHTS (Thousands)	%	SPEND (£ Million)	%
Belfast	744.1	24.6	2,969.0	24.0	148.6	28.4
Derry	153.4	5.1	658.2	5.3	29.4	5.6
NI	3,024.4	100	12,378.4	100	522.5	100

Source: Local Authority Tourism Estimates, NITB, 2007-2009

Note: figures relate to all out-of-state visitors to Northern Ireland, visiting for any reason (holiday, business, visiting friends and relatives) and staying for at least one night and NI residents participating in domestic tourism. *Day trips are not included.*

Derry-Londonderry Events

The tourism potential of Derry has greatly enhanced in 2011 with the introduction of a number of key cultural events, as well as the scheduling of future events in 2012 and 2013, which will bring visitors to the city and county, from all over the island and beyond. For example:

- Derry City Council received **€67,000** from Irish Walled Town Network **between 2006 and 2010**, to promote **Irish Walled Towns Day**, held on the Sunday of the first weekend of Heritage Week. This funding helped deliver events which celebrated the City's status as one of Ireland's most 'complete' walled towns and engaged with the community, explored perceptions of the Walls in a divided society and widened access to a rich heritage offer. NB. Analysts¹⁰ highlighted that the economic impact of an event such as the Irish Walled Towns Day held in Youghal, Co. Cork, was a **return of €480,000** in to the local economy, based on an **investment of €16,000**.
- Derry City Council's '**Summer Animation programme**' 2011. This programme involved a mix of street theatre, music, storytelling and interactive workshops within and around the city's historic walls throughout the summer months.
- In **August 2011**, a delegation from Derry and Donegal, led by Derry City Council and Failte Ireland attended the **Milwaukee Irish Fest, North America**¹¹. The festival is renowned as the world's largest Irish cultural festival and attracts up to 150,000 visitors from throughout the US. Derry-Donegal took centre stage at the festival through organising and hosting the showcase event, which provided an ideal base from which to get in touch with the North West's Diaspora of 9 million. Delegation members met a range of civic officials, representatives of business and tourism as well as media organisations. NITB and Failte Ireland representatives secured extensive interview airtime on the Stephanie Abrahams radio programme which has a reach of up to 9million people. Other publicity secured included nationwide television coverage through interviews with Fox News.
- The City's first '**Culture Night**' was held on **24th September 2011** to include a wide range of activities throughout the city e.g. 'Catwalk on the City Walls' i.e. fashion show on the historic City Walls on the location of the Grand Parade; Street Performances; 'Tour n' Trails' i.e. Folklore Song and Music; city tours; Treasure Trail, commencing at the Guildhall with clues located on existing monuments and buildings.
- On 7th October 2011, Derry City Council announced that next summer as one of the world's most popular public art events will be held i.e. '**CowParade**'. The CowParade event will bring fibreglass reinforced cows to the streets of Derry where, decorated by local artists, they will be placed on display for public viewing. The finale is set to take place in the city as part of the Irish Walled Towns Weekend (mid-**August 2012**) with the charity auction taking place in September 2012.

¹⁰ The Heritage Council in conjunction with the Irish Walled towns Network commissioned KMPG to assess the monetary benefits of the Walled Towns Day held in Youghal, Co. Cork (2008)

¹¹ <http://www.derrycity.gov.uk/News/Derry-Donegal-delegation-overwhelmed-by-opportunity>

CowParade events have been staged in more than 50 cities worldwide since 1999. This event is expected to increase tourism and revenue for the city, as has been the case for other host cities i.e. Edinburgh CowParade 2006 resulted in **28% increase in visitor spend** to the city as well as an average increase of 24% in visitors to the attractions hosting cows.

- Derry-Londonderry will be the host port in the final leg of the Around the World **Clipper Yacht Race** in **July 2012**.
- Derry-Londonderry will host the **All-Ireland Fleadh** in **2013**. The festival attracts up to 300,000 visitors and is worth about €40m to the host venue.
- Derry-Londonderry will host the **Féile Peile na nÓg**, a four-day all-Ireland football championship for Under-14s in **2013**. Approximately, 25,000 boys and girls take part in this festival from across Ireland.

City Walls – Supporting Tourism

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), a 10% increase of the previous year and a 31% increase from 2005 figures.

Table 4: Visitor Numbers

2005	2006	2007	2008	2009	2010	% Diff 09/10
190,100	207,200	213,415	215,015	225,765	248,340	+10

Source: Department of Enterprise, Trade and Investment (DETI), NI Visitor Attraction Survey Jan-Dec 2010

Tourism trends relating to the Walled City include:¹²

- Appeals to both middle aged and older visitors - 36% aged 55+; 36% aged 35 -54 year olds; and 28% aged under 35;
- 31% of visitors 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%);
- Of those interviewed in the Walled City, the majority were overnight holiday visitors with just over one third being on a day trip;
- The vast majority of overnight visitors to the Walled City were staying in the area;
- The majority stayed in the area for 1 – 3 nights - a shorter length of stay compared to visitors staying in the immediate locality of the other Signature Projects indicating that there is scope to further improve the range of things to do and see to encourage longer stays;
- The 'Walled City' project delivers a strong product theme with around two thirds (64%) of visitors aware of a theme connecting aspects of the attractions/places associated with the SP area;
- History/heritage, scenery and opportunity to learn were the most appealing aspects of the visit to the area;
- Visitors rated the Walled City Signature Project the highest amongst the Signature Projects with regard to providing opportunities for onsite learning about people & places the experience of meeting and interacting with locals;
- The Walled City Signature Project offers a strong brand experience. Brand attributes most often identified in relation to the actual experience were historical (76%) and celebratory (24%);

¹² Department of Enterprise, Trade and Investment (DETI), NI Visitor Attraction Survey Jan-Dec 2010. NB. NITB implemented a survey of around 1,500 leisure visitors and domestic holidaymakers staying in Northern Ireland (i.e. excluding day trippers), completed on-line after returning home from their recent visit. In addition, a series of more in-depth face-to-face interviews were completed with visitor and domestic leisure staying and day trippers in the Signature Project areas

- The Walled City scored above average (across all five Signature Projects) for Historic and Celebratory attributes although scores were below average for all of the remaining experiential attributes (i.e. Memorable, Uncovering stories, Authentic and unique, Iconic and precious) demonstrating the scope for further improving the visitor experience in this Signature Project; and
- The Walled City Project needs to continue to improve and develop the delivery of a memorable or iconic experience where uncovering stories help reflect the authentic, unique, precious and celebratory environment sought by the visitor.

Although there is no trading on walls at present, Derry City Council is in the process of securing a license. Once granted, the Council will seek local traders who can offer quality products to tourists.
Trading within the City Walls will enhance visitors experience and tourism related revenue.

Derry City Council and Ilex are currently **drafting a joint tourism development plan** to include a 'passport scheme', which will result in the development of a brochure for tourists, providing information, vouchers and discounts if they visit more than one of the historic buildings. Each historic site will also be encouraged to signpost visitors to other sites. It is hoped that this approach will help to link/provide synergies between the heritage sites and promote a co-ordinated approach to enhance visitor numbers and spend.

By **mid-2012, the Walled City Lighting project will be complete**, which will use creative lighting as a means of showcasing individual buildings, landmarks and public spaces and using this lighting as an art form. This would enable the city to; emphasise its historic walls; provide opportunities to run events in the evening; increase night-time visitors; create a night-time economy; and providing an incentive for visitors to stay in the city at night-time, potentially turning daytime trips into overnight stays.

Ebrington – Supporting Tourism

As the Ebrington Barracks are still under development, the tourism potential and economic value is yet to be fully realised. Towards the end of the next financial year (April 2012) Ilex will engage with the private sector to market Ebrington. Based on discussions with Ilex, there has been considerable interest from the private sector, particularly with regard to Hoteliers who have indicated their interest in operating a boutique hotel within the Ebrington Barracks.

It is expected that many of the restored listed buildings listed in Table 2 will be in active use and available to the public within the next 18 months, with guided tours of the site being offered. It is estimated that the development of Ebrington will generate at least 1,000 jobs.

Key to the development of Ebrington is the Peace Bridge, the EU-funded foot and cycle bridge which provides new shared space and connects Ebrington and St Columb's Park within walled city, therefore the wider economic benefits can extend beyond the limits of the Ebrington site.

Events: The Parade Ground will be open to the public by next year, have a 15,000 people capacity and operate as a civic space for concerts and other outdoor events. It has also been announced that the Parade Ground will host one of three concerts as part of the London 2012 Olympics Festival on 21st June 2012.

4. Social and Environmental Benefits

Social Benefits

Derry City Walls and the redevelopment of Ebrington Barracks will contribute towards achieving the following social benefits:

- **Enhancing Community Relations** – The tourism offering, to include the City Walls and Ebrington Barracks, will promote good relations and social cohesion through culturally led regeneration. The redevelopment at Ebrington will utilise heritage to redevelop 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. This is likely to result in increased employment, a sense of community and social inclusion and comfort/security in public places.
- **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.

Environmental Benefit

It is evident that the case study area contains a wide range of buildings that have been 'Listed' for their 'Architectural' and/or 'Historic' interest. The protection of buildings of special architectural or historic interest by 'Listing' imposes restrictions on developers including the requirement that any alteration which affects the character of the structure, internally and/or externally, must have attained the consent of NIEA prior to the commencement of any works.

This requirement is enshrined in legislation as Article 43 of the Planning (NI) Order (1991) and is known as Listed Building Consent. The restoration or development of Listed Buildings is managed by the Planning Service, through the planning application process which is applicable to all proposed developments. It is important that the above is considered in the preservation of the City Walls and restoration of the historic landscape of the 26 acre Ebrington Barracks site.

5. Benchmarking

To fully realise the economic and social benefits of this unique asset, it is important that local and international best practice is reflected in its development and promotion.

To ensure that information sharing continues and in turn the delivery of 'best practice' methods from other walled towns/cities, Derry City Council should maintain their membership of the **Irish Walled Town Network** and the **International Walled Towns Friendship Circle** (WTFC). Furthermore, Derry City Council and other key stakeholders should consider best practice guidance and innovative new approaches to developing, accessing and managing walled towns. Best practice has been circulated through the WTFC network as part of **the ARCHWAY (Access and Regeneration of**

Cultural Heritage in Walled Towns) project, which was part financed by the European Union under the ERDF Interreg IIIC programme and led by Chester City Council.

An overview of the above networks and best practice guidance is provided below:

1. Irish Walled Town Network

The Irish Walled Town Network (IWTN)¹³ aims to unite and co-ordinate the strategic efforts of local authorities involved in the management, conservation and enhancement of historic walled towns in Ireland, both North and South. The current membership of IWTN is 21 walled towns¹⁴.

Between 2006 and 2010, IWTN facilitated eight conferences, which aimed to ensure the widening and development of the Irish Network and build formal links with EU partners. According to Derry City Council, the IWTN conferences provided an excellent vehicle for developing partnerships and networking. They also offer the opportunity for learning from other towns' experiences. It has allowed a diverse range of individuals and groups to work together on a cross-border basis; raise the profile of historic built heritage; increase access to that heritage; and to preserve it for future generations. The Conferences are an essential part of the IWTN and the Council would welcome further opportunities for networking.

IWTN's Three-year Action Plan (2011-2013) outlines objectives to ensure that; the walls are protected and promoted as an amenity for both locals and tourists alike; the quality of tourism product, and the hospitality and craft sectors of each town can benefit; and the livelihoods of the construction workers, small businesses and professionals that conserve and interpret the fabric will receive much needed support. Refer to Annex I for detailed actions.

2. International Walled Towns Friendship Circle

The IWTN is formally linked to the International Walled Towns Friendship Circle (WTFC), which is the international association, established in 1989, for the sustainable development of walled towns, walled cities and fortified historic towns. Membership of the WTFC currently includes 140 historic walled towns, walled cities and fortified towns in Europe and beyond.

WTFC's aims are to: establish links, exchange knowledge and experience with other walled towns; to develop joint marketing strategies to increase world-wide awareness of walled towns as historic treasures and tourist attractions; acquire European and other funds for organisations with a cultural historical background; and convene annual conferences in member towns to address topics of key importance. The most recent conference held in Lucca, Italy on 6-9th October 2011, which focused on the theme of strengthening local trade in walled towns.

3. ARCHWAY Project - Access and Regeneration of Cultural Heritage in Walled Towns

ARCHWAY developed a pan-European network for walled towns, enabling them to share information and exchange best practice on issues that affect them all. ARCHWAY builds on the networking potential of the WTFC but is not restricted to WTFC members. ARCHWAY aims to become the principal source of European policy, good practice, innovation and excellence in the conservation,

¹³ The IWTN was established by The Heritage Council in 2005 and includes the following partners: Local Government, the Department of Environment, Heritage and Local Government, EHS NI and Fáilte Ireland.

¹⁴ 21 walled towns and villages throughout Ireland i.e. Ardee, Athenry, Athlone, Bandon, Carlingford, Carrickfergus (NI), Cashel, Clonmel, Cork, Derry (NI), Drogheda, Dublin, Fethard, Galway, Kilkenny, Kilmallock, Limerick, New Ross, Rinn Duin, Trim, Waterford, Wexford and Youghal

promotion, development, management and spatial planning of historic places and also aims to act as a catalyst to help realise the potential of the wider and more inclusive WTFC¹⁵.

In June 2007, representatives from walled towns and cities across Europe came together to share the results of three years' joint working on the development of five guides to good practice in the management and development of walled towns and cities:

1. Conservation (Protections and Enhancement);
2. Tourism Development and Visitor Management;
3. Creative Management of Cultural Heritage;
4. Transport; and
5. Spatial Planning.

Annex II provides a summary of best practise approaches under each of these interconnected themes. Cutting across all the guides was the key issue of promoting 'Access for all'. **It is important that Derry City Council and relevant stakeholders consider each of these guidelines in the development and promotion of the Walled City.**

6. Conclusions

Derry~Londonderry has benefitted from significant public sector investment for high profile tourism projects, which have contributed to the regeneration of the city, consequently improving the experience for residents and local/international visitors. As a result of this investment, as well as the commitment and partnership working shown by Derry City Council, Illex, NITB and the NIEA, the city has been honored with the title of the inaugural UK City of Culture 2013.

The next 12-18 months will see the completion of the Built Heritage Programme and restoration of some of the buildings within Ebrington. This coupled with the newly erected Peace Bridge collectively offer an enhanced tourism product with the potential to generate income and employment multipliers resulting from increased visitor numbers and to stimulate private sector investment in Derry, thereby generating economic and social benefits for the City and wider community.

¹⁵ <http://www.archway-interreg.com>. NB. The ARCHWAY project was part financed by the European Union under the ERDF Interreg IIIC programme and led by Chester City Council.

Annex I: Irish Walled Town Network Action Plan (2011-2013)

According to IWTN Three-year Action Plan (2011-2013) “Walled towns and cities are an important national heritage asset. They link communities to their past, while shaping the current and future urban form and fabric of our modern settlements. The remaining walls or former sites/routes, when effectively conserved, managed and promoted help to create a ‘unique sense of place, belonging and identity’ and are an important long term source of civic pride and focus for tourism, cultural and economic development. The conservation and management of the historic walls also contribute to an enhanced quality of life for residents and visitors alike”

Key actions outlined in this plan include:

Action	Lead	Budget	Date
1. Target the relevant Local Authority and include in the membership any remaining towns with substantial upstanding town defences.	IWTN Management Committee/Heritage Council through the Project Manager	Revenue	2013
2. Complete the suite of Conservation and Management Plans for existing and new members	Individual Local Authorities and IWTN.	IWTN fund	2013
3. Focus available funding on urgent projects in regard to the fabric of town defences and to other priority schedules identified in individual Conservation and Management Plans	Funding Committee	IWTN fund	Projects delivered by 2013
4. Preparation of National Guidelines for the effective management, conservation and enhancement of Walled Towns in Ireland.	Department of the Environment, Heritage & Local Government	DEHLG	Publication by 2011
5. Develop a series of best practice principles in relation to the protection and enhancement of town defences that can be applied to County Development Plans and Local Area Plans and circulate to Regional and Local Authorities. Ensure consultants and contractors conduct adequate research and planning before conservation works begin and conduct all actions according to international best practice as detailed in the Venice and Burra Charters	IWTN Management Committee and Sub Committee of Membership/Heritage Council and DEHLG	Not required	Review of current CDPs and LAPs
6. Encourage local committees to link with all sections of the Education sector, by circulating a series of shared projects. Activate the research agenda of the Conservation and Management Plan	LATs/VEC/Boards of Management/Department of Education	€5000 per town over the lifetime of the plan	2013
7. Establish Irish Walled Towns Public Awareness Campaign:			
7a: Raise awareness of Irish Walled Towns at key entrance points and gateways. Prepare and design a brochure for circulation	Fáilte Ireland/sub-committee IWTN prepare a form for relevant information, other information is now available from the book Irish Walled Towns	€25,000 for design and publication	Town Tourism Surveys
7b: Design and undertake annual awareness surveys	Design Heritage Council/Fáilte Ireland, IWTN Management Committee, undertaken by members.	Not required	Summary of information to be circulated

Study of the Economic Value of Northern Ireland's Historic Environment -
Derry Walls & Ebrington Barracks

Action	Lead	Budget	Date
7c: Prepare a consumer focussed website that will focus on the consumer benefits of visiting the towns, link to each of the towns' own local authority or tourism committee site for further details, as well as linking to/from other relevant external sites. This latter action may be tied in with the Irish Walled Towns Passport Initiative.	Heritage Council/Fáilte Ireland, IWTN Management Committee, undertaken by members.		
8. Actively encourage and promote regionalisation amongst the members. This could take the form of sharing consultants and/or expertise. It could be holding small workshops on shared themes. It could be promoting a regional tourism package. It could be a competition at regional level	Individual members of the Management Committee within each region	€5000 per region over the life time of the plan	
9. Develop a promotional scheme that will encourage foreign and domestic tourists to visit the various towns in the network. This may take the form of a 'Walled Towns Passport' that would provide passport holders with incentives to visit member towns. Design multilingual website that will provide information on each town, their transport links, accommodation and restaurants	Individual Local Authorities, Fáilte Ireland, IWTN	IWTN fund	
10. Encourage mobility between concentrations of Irish Walled Towns. The feasibility of conducting a pilot project linking Cashel, Fethard and Clonmel should be investigated	Individual Local Authorities and IWTN	Private Industry, Leader, Relevant Local Authorities, IWTN fund	
11. Expand Irish Walled Towns Day to include the promotion and interpretation of town wall remains using a variety of media.	Individual Local Authorities and IWTN. IWTN sub-committee to collate relevant information	Individual Local Authorities and IWTN fund	

Annex II – International Best Practice

ARCHWAY Project - Access and Regeneration of Cultural Heritage in Walled Towns

In June 2007, representatives from walled towns and cities across Europe came together to share the results of 3 year's joint working on the development of five guides to good practice in the management and development of walled towns and cities i.e.

1. Conservation (Protections and Enhancement);
2. Tourism Development and Visitor Management;
3. Creative Management of Cultural Heritage;
4. Transport; and
5. Spatial Planning.

A summary of the key points outlined in the five guidance reports is provided in the table below.

Guidance Theme	Overview
Conservation (Protection & Enhancement)	<p><u>Enabling the development of a modern environment with the constraints of a historic setting.</u> Walls strengthen the historic identity of a town, provide a highly estimated aesthetic element and strongly increase the attractiveness for tourists.</p> <p>Conservation - A variety of laws, regulations and programmes exist, local, national as well as international aiming to protect monuments and support their conservation.</p> <p>The conservation of city walls can be a costly and long term undertaking, demanding a substantial share of often limited resources. Therefore, in every conservation plan a thorough investigation is necessary to define their value and to develop sound arguments to convince the decision makers. Four elements should specifically be taken into consideration:</p> <ul style="list-style-type: none"> • Monumental value (i.e. historical relevance, uniqueness, completeness, and historical environment); • Ecological value; • Touristic value; and • Value to the citizens. <p>The main principle of conservation is to fixate the remains of the fortifications as they are now, and protect them from (further) disintegration and damage. This demands a continuous maintenance with respect for old materials and techniques. Modern innovative buildings should not be regarded as disruptive influences but, instead, as potentially enriching the cultural heritage. Development aims to integrate historical remains and monuments into modern town development and attempts to find new roles and functions for historical constructions. Old walls can be incorporated in new buildings and still remain visible. By placing the restoration of the fortifications within a broader framework, not only public and political support for the plan can be increased, but the fortifications are also given a renewed function for the city as a recreational destination, ecological and public linking zone and new tourist attraction.</p> <p>Reversibility and non-destruction - Reversibility is an important concept in modern conservation and restoration approaches. The principle is to do as little damage as possible to the original remains, and enable the reversibility of all conservation, reconstruction and development activities. In reality this will not at all be possible in every situation.</p> <p>Accessibility is a key concept in the conservation of town fortifications Access is the only way to capitalise on their monumental, historical, cultural, ecological, and educational value This is often not so easy, as fortifications are by their nature made to be inaccessible. They are designed to keep people out, and therefore it is often not so easy to make them easy</p>

Guidance Theme	Overview
	<p>accessible without destroying their original character. There are three levels of accessibility that should be taken into account:</p> <ul style="list-style-type: none"> • Physical accessibility; • Visual accessibility; and • Conceptual accessibility (accessible infrastructure of information shields, leaflets and booklets, guided tours, etc., providing historical information and context). <p>Planning - Restoration, conservation or development plan should include solid planning on tourism and exploitation. Well restored town walls with stunning looks do attract tourists, who do not only visit the defence works, but also buy in shops, eat in restaurants and stay in hotels. The town centre will also become more attractive for its own citizens and people living in the region to spend time and money in shops and on terraces. The town becomes more attractive for people to live in, which will also increase economic activity. This will attract new shops, restaurants and enterprises, which do not only see a possibility to earn money, but also want to be associated with the image of a characteristic historical city. The whole image of the town as a place for living, working and leisure will improve as the result of a solid and well executed plan. Such a development will have a multiplying effect on economic, social and cultural life in your town. These multiplying effects might pay back a considerable part if not all of the investments via the increased income of communal taxes and raising prices for rent and real estate. A solid restoration plan should include approaches which aim to generate multiplier effects for the town as a whole in order to carry the long term burden for maintenance and repair.</p> <p>Long term planning is necessary, not only financially. The town and its direct surrounding might change significantly in the coming decades due to demographic, economic or environmental developments. As town walls put a clear stamp on the possibilities and limitations of town planning it is important to try to predict the future, and consider what consequences the conservation plan may have for the future, what problems may arise and how they can be solved.</p>
<p>Tourism Development and Visitor Management</p>	<p><u>Establishing walled towns as a focus for sustainable tourism and economic development without damaging their distinctive and historic qualities.</u></p> <ul style="list-style-type: none"> • Organisation for Tourism - Tourist services are not limited to visitors but are also offered to local residents that live and work in the destination. It is necessary to include all stakeholders in tourism development and planning to provide its sustainability i.e. Public authorities, private sector, and residents and their associations. The following should be considered: who should be involved; what is their role; what is their interest; what/how can they contribute. • Size of Tourism - Adoption of measures with an impact on tourism should be based on relevant statistical data. Tourism data analysis gives insight into tourism demand. The following should be considered: what data is available; can we get better information; what is the data showing; how can we use retrieved information. • Information systems - Walled towns differ from other historic towns in that they have a physical barrier limiting the area which is likely to be attractive to tourists. Usually there are only few entrance points (gates) where visitors can enter the inner circle; the streets are narrow and there is no or only limited parking available. Priority should be given to pedestrian traffic and cars should be less dominant than in more open environments. Providing adequate information to visitors prior to their entering the walled town centre is considered a basic measure that helps avoid unnecessary crowding within the walls. This can be done by setting information points at the wall gates or at the parking area outside the walls. A step further is providing essential information alongside main access routes to the town and on the internet. Basic directions and information are usually provided at larger distance from the attraction. The information should get more specific the closer the visitor is to its final destination. These measures will help smooth the flow of visitors while they are in the town centre. The following should be considered: information prior to arrival (accessibility, attractions, suggested itineraries, web, and information brochures); information on site (signage, brochures, visitor centres, guides); and after departure (follow-up procedures to ensure returning visitors). The information must be appropriate (consider <i>languages; age groups; what is/are most frequent itineraries; and safety</i>) and mark main tourist attractions clearly.

Guidance Theme	Overview
Creative Management of Cultural Heritage	<p><u>Management of the cultural heritage and how to harness this as a driver for their economic future in a sustainable way</u></p> <p>Cultural heritage is <i>“the legacy of physical artefacts and intangible attributes of a group or society that are inherited from past generations, maintained in the present and bestowed for the benefit of future generations”</i>.</p> <p>Historic walled town, gradually developed over time, are a clear expression of the diversity of urban societies throughout history. Their historic centres and quarters, together with their natural and man-made environment, with the rich texture of its heritage, embody the values of traditional urban cultures. A suitable and creative management of its cultural heritage can help walled historic town to preserve their identity, while encompassing their social and economic evolution.</p> <p>European historic walled towns aim to be living models of how towns take care for its cultural heritage and set it as a central point for economic and social development and regeneration, for cohesion and the liveability of their surrounding neighbourhoods, regions and nations.</p> <p>A credible local heritage strategy will have to be developed in close consultation with the organised civil society and take fully into account the experience of international organisations in this field. Heritage strategy must also recognise cultural heritage management as an important tool in fostering development, considering that the processes of preservation, conservation, enhancement and management are deeply interrelated.</p> <p>Historic walled towns believe that conservation-led regeneration can bring sustainable environmental improvements while at the same time creating jobs, stimulating economic activity, and preserving the characteristic look and feel of local areas through their examples, the role of heritage in fostering regeneration is gaining increasing recognition among decision-makers and opinion formers at all levels.</p> <p>Management is dependent upon the development of an adequate planning and financial management model that would allow sustainable financial resources to all stages of the intervention and on-going management of cultural heritage.</p>
Transport	<p><u>The problems of transport, parking and access to and within some of Europe's most attractive and historic places.</u></p> <p>The conflict that arises in walled and historic towns/cities is between the need to keep transporting people and goods into and within the cities and the need to conserve the heritage of the same locality, by minimising the impact of the mechanical modes of transport. Walled and historic cities and towns were not constructed with the motor vehicle in mind, the walls and fortifications were designed to make (unwanted) access as difficult as possible. Inevitably therefore, where these barriers still exist they generate major conflict with the motor vehicle mobility.</p> <p>Priority of access should follow the general pattern of: Walking; Cycling; Public Transport; Deliveries; and Private Cars.</p> <p>As the most local of circulation systems within the walled and historic town and even into its buildings, walking is generally the component that makes up the first and last part of most trips. Any strategy, especially within walled and historic towns, should try and maximise the percentage of this component, not only by discouraging motorised modes, but also by improving on facilities for pedestrians.</p> <p>The level of provision of public transport within and around walled and historic towns depends on the available road widths and alignment, as well as on the type of vehicles used. In many medieval towns only smaller public transport vehicles can reasonably take access. Apart from the size of vehicle used, the type of vehicle used is of utmost importance in relation to the conservation of the urban environment within the town walls. This is essential, not only to promote a more pedestrian friendly environment, but also to protect the buildings from deterioration due to pollution. Ideally, public transport vehicles in walled and historic towns should be zero-emission vehicles, which can manoeuvre easily within the narrow streets that are generally typical of these towns.</p> <p>In the hierarchy of who should be allowed to use a car within the walled and historic town, short-term visitors, who generate business to the town itself, should follow the residents.</p>

Study of the Economic Value of Northern Ireland's Historic Environment -
Derry Walls & Ebrington Barracks

Guidance Theme	Overview
	<p>These are generally shoppers or tourists, both of whom are likely to spend money within the town, thus increasing the commercial viability, which in turn augments the vitality of the centre. The last in the hierarchy of who should use the car are commuters, who come in to the town centre, day in day out, at the busiest time of day (rush hour) and stay there for the rest of the day. Furthermore, these visitors generally have a fixed pattern of arriving at and leaving from the town centre. It is therefore more likely that alternative modes of transport can be utilised by commuters than for the occasional visitor who may come at irregular hours.</p> <p>One sector of society whose transport needs are to be accommodated in any scheme are the mobility-impaired. The most common way to overcome these issues is to create exemptions for the mobility-impaired. This means that restrictions for the able-bodied visitors have to be regulated rather than enforced by means of physical barriers.</p> <p>Certain studies, such as traffic volume flows into and out of the walled or historic area are very important, and these should be carried out on a regular basis, to detect any changes in trends. Such traffic flow surveys should ideally distinguish between the different vehicles accessing the study area (i.e. private cars, LGV's, HGV's, public transport vehicles, etc), as well as car passenger occupancy data (i.e. the average number of passengers per car). Pedestrian flow data should also be collected regularly at the entrance points, to establish the number of people who actually assess the area on foot.</p>
Spatial planning	<p><u>Realistic special planning and management systems to create vibrant and modern places without compromising their historic and local distinctiveness.</u></p> <p>Spatial planning needs to promote urban living, while also maintaining continuity between past, present and future. The spatial approach is a question of multidisciplinary teamwork, with different professionals collaborating in a complex process carrying out this work must take account of the political and social frame-work of each country. It is aimed at everyone, whether in the urban settlement or region as a whole. It is a political process that seeks a balance between different interests –public and private– to solve opposing demands on space and development programmes.</p>

ARMAGH INCLUDING THE NAVAN CENTRE CASE STUDY



Contents

1.	Introduction	2
2.	Background.....	2
3.	Economic Benefits	6
4.	Social and Environmental Benefits.....	7
5.	Looking ahead – the Armagh Gaol Development.....	8
6.	Conclusions.....	8

1. Introduction

The Navan Centre and Fort demonstrates how the historic environment is being protected while also providing an educational resource to the people of Northern Ireland to understand their relationship with their heritage. The Centre is just outside of the City of Armagh which is the seat of both the Roman Catholic Church and Church of Ireland and contains many public and private buildings of heritage value.

2. Background



Navan Fort is a hilltop earthwork that was once the royal seat of the Kinds of Ulster and is associated with CúChulainn, the legendary Ulster warrior. It is part of a complex that includes Haughey's Fort, the King's Stables and Loughnashade where human remains and four ornate bronze trumpets were recovered in the nineteenth century. There is an association with other important Irish archaeological sites such as Newgrange or the Hill or Tara in County Meath or Cruachan in Roscommon.

Visitors to the nearby City of Armagh receive a very different, but equally rewarding historical experience. The city is the seat of both the Catholic Church and Church of Ireland and so is endowed with not one, but two impressive cathedrals. St. Patrick's Cathedral has a commanding presence and its richly decorated interior is a nineteenth century triumph. St. Patrick's Church of Ireland Cathedral was restored in the 1770s on the site of St. Patrick's second church. Brian Boru, the first king of Ireland, who unified island in driving out the Norsemen, is buried below the north wall.

As well as these superb structures, numerous buildings, each of a unique individual architectural merit, are dispersed across the city, though concentrated around the Church of Ireland cathedral or the Georgian Mall, Francis Johnson's magnificent central green. A few of these buildings are in public ownership, but most others are in use as religious centres, banks, private homes or, in the case of the original gaol, a pub.

The city is also home to the Armagh Observatory and Planetarium, the historic Armagh Public Library, the Armagh County Museum, and the Royal Irish Fusiliers Museum. Saint Patrick's Trian Visitor Complex explores the history of the city, the life of St. Patrick and, in honour of past resident, Jonathan Swift, Gulliver's Land of Lilliput. There are eleven listed buildings in the city and many others of architectural or historical value.

Other attractions of the historic environment in County Armagh include Keady Heritage Centre and linen mill exhibition, Orangeman Dan Winter's cottage and ancestral homes, and the National Trust properties of The Argory, an historic mansion, and the Address House farmhouse, located at Dungannon and Annaghmore respectfully.

The Asset: Navan Fort may have been in use from up to 5,000 years ago, but the main period of activity relates to the first century BC when it appears the mound supported a deep cobble platform and a huge conical wooden structure or enclosure. This is believed to have had a ritual role rather than a defensive one as there is evidence that soils from around Ireland were brought to the site and that the structure was deliberately burnt soon after erection.



Ownership: The Navan Centre was purchased from an independent trust in 2005 and is now within the ownership of Armagh City and District Council.

Description: Today, visitors can enjoy a commanding view, but in common with other archaeological sites where most above ground structures would have been of wooden construction, the visible evidence is largely confined to earthworks. This is confounded by Celt's reliance on an oral rather than written heritage. Instead, The Navan Centre has an impressive visitor centre and much effort is made through guides and re-enactments to allow people to interpret this history of the site and to recreate the environment in which it was set.

Investment: The site is managed and financed by the local authority along with the Palace Stables and Saint Patrick's Trian. It used to be open full-time during just the summer months, but following a strategic review in 2009 it was recommended that the success of the site merited all-year round opening and priority funding. An initial investment of over £240,000 was made by the Council to rehabilitate the centre following several years of closure. Grants of over £225,000 have been received from the South Armagh Tourism Initiative (SATI) to redesign the exhibition, to build an early Christian dwelling, to provide hands-on materials for children and interpretative signage. The local authority provides matching funding. Regular expenditure is above £600,000 and is only partially supported by visitor receipts which account for a little over one fifth of this sum. The principal sites in the case study area and County Armagh, visitors and revenues are listed in Tables 1 and 2.

Table 1: Principal sites in Armagh City and Environs

Key	Feature	Description	Ownership	Visitors	Revenue
1	Navan Centre and Fort	Iron Age hill fort and visitor centre.	Armagh City & District Council	Centre has only been open full-time since 2009. Visitor numbers now 39,890 and growing from 20,000 in 2009 and 12,816 in 2008. NI = 58%, rest UK 8%, ROI 14%.	Financed by County Council and through grant revenue from SATI and others. Additionally through summer entrance fee (adults £6, children £4, family £16.50) plus café sales plus occasional hire of auditorium or central atrium for events, films and talks.
2	Armagh Planetarium	Planetarium. Not a historical feature as such, but related through the astronomy heritage of Armagh.	Registered charity with funding from DCAL	35,000 in 2010/11	Principally through admissions (adults £6, schoolchildren children £4 and families £20).
3	Armagh Observatory	The original observatory. A working observatory, but with historic astronomy instruments too.	Funded by DCAL	Around 1,000 visitors per year by appointment. Grounds receive 50-75,000 visits, mostly by local people.	No fee. Funded by Dept of Culture, Arts and Leisure as a working observatory. Visitors welcome to facility by appointment
4	Saint Patrick's Trian	A visitor centre dealing with Armagh's historic heritage	Armagh City & District Council	1,500	Entrance fee
5	Armagh County Museum	Many historical exhibits including pre-history and household objects	Armagh City & District Council	5000	Free entry
6	Palace Stables and Demesne	The Archbishop's Palace now houses the council offices, but the grounds contain historic buildings including restored stables and the ruins of a friary.	Armagh City & District Council	n/a	Free entry
7	St. Patrick's Cathedral COI	Seat of Church of Ireland in Ireland. Also Brian Boru's grave, 3000 year old Tadragee Man statue, orchard and gardens	Roman Catholic Church	30000	Entrance fee of £3 for visitors including for guided tours
8	St Patrick's Cathedral Roman Catholic	Seat of Roman Catholic Church in Ireland	Church of Ireland	30000	Free entry
9	Armagh Public Library	Oldest library in Northern Ireland, Many antique and ancient books and prehistoric artefacts	Amagh City & District Council	4000	Free entry. Guided tours £2 per person.

Study of the Economic Value of Northern Ireland's Historic Environment -
City of Armagh including the Navan Centre

Key	Feature	Description	Ownership	Visitors	Revenue
10	No 5 Vicar's Hill	Old Diocesan Registry. Extension to library display. Ancient books, maps and prints permanently displayed. Ogham Stone	Armagh City & District Council	Opened in March 2011. Had 300 visitors on Heritage Day.	Entrance fee of £2 for adults (£1 for senior citizens)
11	Royal Fusiliers Museum	Military exhibits		1000	Free entry
		2010 visitors		approx 150,000	
		2010 visitor revenue		approx £450,000	

Table 2: County Armagh

Key	Feature	Description	Ownership	Visitors	Revenue
1	The Argyory	Victorian mansion belonging to the National Trust.	National Trust	12,000	Admission fee of £2.75 for adults. Tours at £6 per adult.
2	Ardrress House	Gentleman's farmhouse once belonging to the Ensor family. Now owned by the National Trust	National Trust	1,500	Admission fee of £5 for adults (£12.50 families) or £3 to farmyard only (families £7.50)
3	Keady Heritage Centre	Museum on the history of Keady and the linen industry.		500	£3 admission fee
4	Dan Winter's Cottage	Restored cottage once home to Dan Winter. Exhibition of Orange Order regalia	Trust	4,100	Entrance fee
5	Dan Winter's House	Restored home of the Winter family and display of arm machinery	Trust	3,000	
6	Bessbrook	Quaker village. Derrymore thatched house and Slieve Gullion railway viaduct	various private ownership	n/a Annual event attracting railway enthusiasts	
		2010 visitors		approx 25,000	
		2010 visitor revenue		approx £100,000	

3. Economic Benefits

Figures obtained from the visitor attractions suggest that around 175,000 people visited the listed sites in 2010, although many visits by school children would be additional to this number and visits to the grounds of sites such as the Palace Stables and the Observatory will be well in excess of this number. Direct visitor income from entrance fees, shop or café sales is believed to be in excess of £550,000.



Armagh Observatory

A majority of the recorded visits will have been by local people, but visitors from elsewhere in and outside Northern Ireland will have made a respectable contribution.

According to NITB statistics, County Armagh received 58,500 overnighting out-of-state and domestic holidaymakers in 2009. These numbers resulted in 230,000 stays and an estimated spend of £8.8 million.¹ Locally, figures have been compiled by STEAM² which has undertaken such analysis for various local authorities using supply-side studies of accommodation and facility provision rather than surveys of tourists. These figures are significantly higher than those prepared by the NITB due to the inclusion of 312,000 day trips (2009). A further 137,000 visitors stayed overnight, but 97,000 of these visits involved stays with friends and relatives (SFR) which is unlikely to have been captured entirely by the NITB data. Of the remainder of 40,000, about one fifth (22.1%) involved serviced accommodation in 16 establishments, only two of which have in excess of ten rooms. A smaller proportion, 7.3% involved non-serviced accommodation. Altogether these visitors accounted for 656,000 tourist days. Total revenue before VAT is estimated as £35 million in 2009 of which the direct revenue from accommodation was estimated at £22.5 million with indirect expenditure at £12.4 million. **Once a multiplier effect is added, the economic impact rises to £38.2 million of which £25.8 was from overnights and £12.4 million from day visits. The relative NITB figure for direct spend is just £8.8 million.** Table 3 summarises these estimates.

Table 3: Out of State Visitors with Domestic Holidaymakers 2008-2009

2009	Trips (Thousands)	%	NIGHTS (Thousands)	%	SPEND (£ Million)	%
Tourists STEAM	448.0	-	136.0	-	22.5	
Trips NITB	58.5	1.0%	229.6	2.2%	8.8	1.7%
2008	Thousands)	%	NIGHTS (Thousands)	%	SPEND (£ Million)	%
Tourists STEAM	440.0	-	128.0	-	21.7	-

¹ The NITB acknowledges that there is a low level of statistical confidence for survey-based data.

² Scarborough Tourism Economic Activity Monitor

Income at the Navan Centre is supported by visitor fees, the café and occasional hire of the auditorium. However, as a public facility, the centre has to be conscious of the need to avoid competing directly with enterprises in the city for the same type of business. Elsewhere, many of the historical sites in the city and county of Armagh are, like the Navan Centre, financed by the local authority and through the SATI. The National Trust owns the Argory and Ardress House. Privately owned buildings of heritage value have other primary purposes, for example as places of worship or as banks. Many are opened to visitors, for example on Heritage Day, when 500 people visited the new exhibition at the old Diocesan Registry at No 5 Vicar's Hill, "The Orchard County", is endowed with an impressive natural heritage such as the Ring of Gullion. However, the county is beginning to realise the economic potential of its historic environment, especially its uniqueness as a spiritual centre for the two principal faiths in Ireland.



4. Social and Environmental Benefits

The Navan Centre functions primarily as an interpretive facility for the early history of Ireland. Ireland has an impressive archaeological record evident in the 14,500 and 125,000 historic sites and monuments in Northern Ireland and Republic respectively. Although impressive, there are rarely interpretive facilities for visitors beyond an occasional single board. The exhibition at centre helps to fill this gap and is designed to serve the needs of all ages. It is more developed than that to be found at many similar sites including Tara and Cruachan and comparable only to Newgrange. Tour guides are always available to accompany visitors to the mound and are able to adapt the commentary to serve the interests of the group, be this historical, Celtic myths or more general interest. The guides estimate that only around 10% of visitors have a particular archaeological interest.



The exhibition also appeals to families. Guides dress in Celtic clothing and take on the persona of an individual who may once have been associated with the site, taking visitors on a tour of a carefully re-created hut and enclosure and introducing visitors to the methods of cooking that would once have been used. Staff provide an educational service on living history and for tourism studies to primary, secondary and further education levels as well as special needs. Programmes are designed to meet the World Around Us element of the curriculum as well as special

projects such as on the apple industry or other products from Armagh. Around 15,000 students visit the centre each year, mostly from the Southern Education and Library Board area, but also from other parts of Northern Ireland.

The Navan Centre and Fort is an attraction whose origins are sufficiently distant to ensure that it appeals to all communities. The same is true of the City Library. Although, this impressive collection is in essence a scholarly resource, the library is extremely welcoming of visitors, including children who are permitted to read and touch the many antique books in contrast to other similar historic libraries in Ireland. The offshoot at No 5 Vicar's Hill was developed specifically to cater for this interest. Likewise, the observatory, while not a tourist facility, is welcoming of visitors and is in the process of developing an "astropark" of outdoor exhibits of educational value. This heritage has spurred the establishment of the Planetarium as both a visitor attraction and resource for the community. Most visitors are school children and the facility's outreach programme visits 12,000 school children per annum.

The City of Armagh is recovering economically. Social housing is juxtaposed beside features of historic interest which, in some cases, serve marginal uses such as for local market places. The landmark Armagh Gaol is in the process of renovation with funds from the Prince's Trust as a mixed use development to include a boutique gaol hotel. The presence of so many listed heritage buildings is attracting both public and private investment in regeneration. The Mall and the area around St. Patrick's COI Cathedral contain many Georgian buildings that have attracted new owners and tenants, both commercial and private households. At the Millennium, Armagh was supplied with a new theatre and arts centre alongside the restored Market Square. The county is recovering its reputation as a tourist destination following the trauma of The Troubles, but its rich heritage derives from a range of historical assets from all eras and communities. This diverse social and cultural identity has the potential to attract more visitors in the future.

The land at Navan Fort has remained largely undisturbed by crops for generations and its biodiversity is not only beginning to be appreciated, but is itself of heritage interest as a consequence. The land here is protected as it is at the other sites listed, notably the gardens at Armagh COI Cathedral and the National Trust properties. Several listed buildings in the City of Armagh surround the green space of the Mall including the Court House, the County Museum and properties at 1-5 Charlemont Place. Their presence provides a further rationale for the maintenance and protection of the site. The observatory's gardens are maintained as an inner city parkland as are the Palace Demesne and the gardens of St. Patrick's Cathedral. The observatory also has the longest single climate series from a site in the UK.

5. Looking ahead – the Armagh Gaol Development

A major on-going development is the renovation of the historic Armagh Gaol. To meet this objective a partnership has been established between Armagh City and District Council, the Prince's Regeneration Trust and the Trevor Osborne Group to transform the former gaol into a mixed use development comprising a 50 room boutique hotel, a restaurant, retail units and a heritage centre.



Armagh Gaol opened in 1780 and was designed by two of Ireland's leading architects of the time, Francis Cooley and William Murray. It closed only in 1988. The Gaol is an imposing and impressive building which faces onto the Mall, the city's historic green which is surrounded by a mixture of impressive Georgian and Victorian architecture. At present the Gaol is listed on the Buildings Heritage at Risk Register and is physically divorced from the Mall by a major road. Several of the adjacent buildings, along with others on the Mall, are incongruous to the Conservation Area and diminish the historic setting.

The £25 million renovation is expected to be the centre piece of a planned transformation of the city centre that includes the diversion of traffic to outer link roads, an extension of the public realm and the ultimate restoration of the Mall including several listed buildings. It is expected that redevelopment of the Gaol alone will provide for 350 jobs. Once complete, the project will strengthen the "Ecclesiastic Capital of Ireland's" claim to a share of the expanding Northern Ireland tourism sector.

Inevitably, given its former use, public support is essential to the success of the project. A community workshop and public open evening were held in June 2009 with a follow-up open evening in January 2011. Support was expressed for the hotel development, but in combination with assurance of public access including a proposed Heritage Reconciliation and Learning Centre and a heritage trail. Such elements will be essential to the Gaol's capacity to maintain community buy-in and to attract domestic and international tourism. Realisation of the heritage and educational potential will also be an asset to the proposed application for additional funding from the EU Peace III Programme.

Malmaison Hotel,
Oxford



Best practice

Armagh is not the first town to have considered converting a former gaol into a hotel. The Trevor Osborne Group is also responsible for Oxford Castle Quarter, a regeneration project which has as its centrepiece the former gaol, now a Malmaison boutique hotel. There is also a learning centre and family/schools focused exhibition as well as various restaurants. The development has had its challenges. The Castle is rather contained and access to the Quarter is not immediately obvious. Most seriously, an ugly 1970s County Hall and the suspension of the proposed redevelopment of the adjacent shopping centre, shield the Quarter from the touristic heart of Oxford. Light footfall may have restricted the opportunity for the Castle Quarter to develop as a cultural centre and the variety of restaurants to more generic chains. To ensure the awareness of local people and of activity throughout the day and year, the Quarter has marketed itself as a local destination, has a seasonal newsletter and organises numerous events throughout the year.



Oxford Castle Quarter

To some extent, Armagh Gaol is better positioned. By virtue of site on the Mall, the Gaol will have a stronger connection with the city, at least once road severance is addressed. However, Armagh receives a tiny fraction of the tourists who visit Oxford, so events and local marketing will be even more important. The learning centre or exhibition will inevitably have a different level of solemnity with conference/media space for more than 60 people recommended. Northern Ireland's weather will affect the viability of events. In this respect and others, Abbaye Neumunster in Luxembourg (www.ccrn.lu) has a covered exhibition space and would be an example of best practice.

6. Conclusions

Armagh has rightly realised the value of its historic environment as a resource for economic and social development and for education. Most sites are valued by the whole community and, while some structures were associated with particular traditions, each contributes to a richly diverse range of heritage that can contribute to urban regeneration, social interaction and tourism.

Pre-Christian, Celtic and early Christian history are important elements of the historic environment in County Armagh and of the tourism product. The economic value of these sites is already assured through the efforts made to enhance their popular and educational appeal and therefore to contribute to the economic and social welfare of residents of the city and Northern Ireland. There remains a need to attract international visitors from more habitual destinations such as Fermanagh and the Causeway Coast. There are challenges in this respect given recent history and the superficially rather run-down appearance of the city which distracts from its heritage attractions.

Developments such as Armagh Gaol could do much to help revive the city and allow it to achieve a critical mass of visitors. There is much potential to promote the county's heritage in combination with its attractive hilly countryside as well as that of neighbouring neglected border counties in the Republic. In addition, there is a considerable opportunity to coordinate sites with similar historical themes in terms of marketing, event time-tabling and the information provided so that visitors receive a rewarding and comprehensive experience, increasing visitor numbers through return visits and recommendation. These themes also have the potential to attract more visitors from the Republic and internationally. Astronomy, including the historic ingredient, is another area with the potential for overseas and cross-border collaborative initiatives, for example through similar locations such as Birr Castle in the Republic and through the appeal of the planetarium as the only such facility open to the public in Ireland.

The tremendous Georgian and Victorian architecture of the city is an asset whose value is already being used to market the city's distinctive identity across Ireland and the UK as a destination for both visitors and new investment. Georgian Day is already a popular date in the cultural and historical calendar of the city and helps to strengthen the link between the people of Armagh and their heritage.

LOUGH ERNE AND FERMANAGH CASE STUDY



Contents

1. INTRODUCTION	3
2. BACKGROUND	3
3. ECONOMIC BENEFITS	6
4. SOCIAL AND ENVIRONMENTAL BENEFITS	8
5. CONCLUSIONS	9
ANNEX I: WATERWAYS	10

1. Introduction

Enniskillen the “Island Town” is centred between the Upper Lough Erne to the south-east and the larger Lower Lough Erne to the north-west. The lake has a spectacular natural setting below the Cliffs of Magho in the north and an undulating drumlin landscape of small farms and woodland to the south and east. Undoubtedly this landscape is a factor that attracts over 177,000 overnighting visitors per year, making the county the third most visited in Northern Ireland. An equal element of this landscape is the historical environment which encompasses the Pre-Christian, early and later Christian eras, the Plantation period, industrial heritage and military and wartime heritage.

2. Background

Any map of the area around Lough Erne is almost obliterated by dots identifying prehistoric tombs, Iron Age forts, crannogs and other settlements (See Table 1 for some examples of these sites). Amongst the most famous of these are the Drumskinny Stone Circle near Kesh on the north shore of Lower Lough Erne and the nearby Janus Stone, a double-faced figure from Celtic times now located in a cemetery on Boa Island. Monastic remains on Devenish Island and White Island provide evidence of Ireland's Golden Age between the sixth and tenth centuries, but also of this culture's vulnerability to Viking attacks and the relative safety afforded by the profusion of lake, forest and bog. Such high profile remains are accompanied by the numerous ruins, early Christian abbeys, churches and graveyards scattered throughout the landscape. The period of English invasion and Protestant settlement is reflected in the ruins of castles or fortified houses at Tully, Monea and Enniskillen and in the subsequent construction of magnificent Plantation houses and demesnes such as the National Trust properties of Castle Coole, Florence Court and Crom. Enniskillen Castle crosses these times having began life as a seat of the powerful Maguire Family before it became an anti-Jacobite stronghold.



Table 1: Principal sites around Lough Erne

Key	Feature	Description		Visitors	Revenue
1	Belleek Pottery	Historic working pottery	Private company	The largest single attraction receiving 250,000 visitors per year	n/a
2	Marble Arch Caves	Principally a natural phenomenon, but exhibition is part historical.	Private company	70,000 visitors per year	Adults £8.50, children £5.50 families £19 (caves).
3	Enniskillen Castle	Castle and Fusiliers museum. Tourist and education function	Town and District Council	42,000 in 2010	£4 adults, £3 children
4	Devenish Island	Monastic remains.	Managed by NIEA	30,000	Free. Ferry £15
5	White Island	Monastic remains.	Managed by NIEA	2,000-3,000	Free. Ferry was £4
6	Castle Archdale	Forest Park, castle ruins and seaplane heritage. Managed by NIEA	Managed by NIEA	185,000	Free entry
7	Florence Court	Mansion and demesne	National Trust	17,000 paying (34,600 to gardens)	Adults £5, children £2 families £12. gardens
8	Castle Coole	Mansion and demesne	National Trust	9,000 paying (34,000 to gardens)	As above
9	Crom	House and gardens beside Lough Erne.	National Trust	6,500	Adults £3.25, children £1 families £7.50
10	Tully	Fortified house overlooking Erne. Site of famous massacre.	Managed by NIEA	3,400	Admission fee £3
11	Monea Castle	Plantation Castle ruins In care of NIEA	Managed by NIEA	17,000	
12	Cole's Monument	Obelisk in care of town council. Views over Enniskillen and Erne	Managed by Town and District Council	Open in summer.	
13	Boa Island	Caldragh Cemetery containing Janus Stone.	Managed by NIEA	n/a	
		2010 visitors		approx 420,000 (less Beleek Pottery)	
		2010 revenue		approx £1,7 million (less Beleek Pottery)	



Headhunters barber shop and railway museum

Fermanagh's industrial heritage is represented by the Sheelin Lace Museum and by the world-famous Beleek Pottery. The railways that were once used to transport coal to the pottery and which once linked the county to Belfast and Dublin have sadly been torn up, but an abundance of railway memorabilia can be seen at the Headhunters Barber Shop in Enniskillen where a haircut is optional.

Lough Erne has a unique Wartime identity within the British Isles as a base for Sunderland and Catalina seaplanes whose job it was to locate enemy warships and submarines. The base was once home to thousands of servicemen and much evidence of this heritage remains in the vicinity of Castle Archdale where a museum is also housed. There are several crash sites and memorials in the area. Military heritage is also represented in Enniskillen Castle which houses the county museum as well as a separate museum for the town's two regiments, the Inniskilling Dragoons and Fusiliers, who had an influential role in the Battle of Waterloo and the two World Wars. Enniskillen itself is an attractively located above the River Erne and is endowed with much impressive Victorian architecture. Amongst this is Portora School founded by James 1 in 1608 whose part pupils include Oscar Wilde and Samuel Becket.

Lough Erne is a major destination for cruising with rentals by around 2,000 rentals per year in addition to those owning boats. Three quarters (78%) of visitors were from Northern Ireland in 2010. Cruising is an excellent means to enjoy the outstanding scenery of Lough Erne which is connected to the larger Shannon system via the Shannon-Erne Waterway. Cruising is also the perfect means to visit the numerous islands including Devenish Island and White Island which have early Christian remains and are in the care of NIEA. There is no information about how many of these informal visits are made, although most first time trips presumably include a visit to Devenish Island which is served by Lough Erne Ferries. Boa Island is accessible via



a causeway, while White Island was served by a ferry until this year although the family continues to hire boats and run the Drumhoney caravan park. Another private caravan and camping site is located nearby at Castle Archdale, a state-owned forest park with castle ruins and once home to a Wartime flying boat/seaplane base. With the exception of the hanger at the private yacht club, physical evidence of the operation is rather limited, although Castle Archdale houses a museum.

A wartime Catalina which featured in the Seaplane Festival

A recent privately organised seaplane festival attracted 5,000 visitors. Lakeland Seaplane Tours is a small local company operating flights over the Lough.

The largest single attraction in the area is Belleek Pottery. Marble Arch, a cave system near Belcoo, draws 70,000 visitors per year. It is located within a National Nature Reserve and forms part of an international geopark that stretches across the border into County Cavan and which includes a range of fine karst and post-glacial drumlin landscapes. This marshy lakeland and once heavily wooded landscape conceals much evidence of early habitation and religious remains which are an intrinsic part of its identity. Marble Arch Caves are located near to Florence Court and its exhibition is directed at a variety of interests, including historical and folklore. Of the two other National Trust properties, Castle Coole is located just outside Enniskillen while Crom is located beside Upper Lough Erne and accessible by cruiser. These properties together attract 670,000 visitors per year, a respectable figure given Fermanagh's geographical distance from the larger population centres. Enniskillen Castle attracts 42,000 visitors per year.

Other important archaeological and historical sites around Lough Erne tend to be freely accessible. They serve a general interest in complementing the landscape, wildlife and recreational assets of the area. They are also sufficiently numerous or valuable to serve those with specialist interests. Monastic and ecclesiastical sites in the area would have had close ties with more major abbeys such as those at Boyle or Clones and would attract some specialist tours. The colourful, often turbulent, history of Enniskillen, along with its distinct architecture, has a cultural resonance that attracts both special interest and general tourism. Many people, Catholic and Ulster Protestant, have emigrated from the area in the past to North America and Australasia and consequently genealogy is major business including visits by people wishing to explore their family history. "Raths", ancient forts and settlements associated with particular families, are amongst the physical evidence and are scattered throughout the county. Until very recent times this flow of visitors would have included veterans stationed on Lough Erne, although family ties remain strong along with formal ties such as those with squadrons of the Royal Canadian Air Force.

Fermanagh Lakeland Tourism is the Regional Tourism Organisation responsible for marketing the area through collaboration between local businesses, the NITB and Fermanagh District Council. An International Becket Festival is proposed for 2012 involving collaboration across Ireland.

3. Economic Benefits

It is impossible to distinguish entirely the economic benefits of the historic environment from the natural environment in Fermanagh. The same consideration applies to the value that local people place on their historic environment. The contribution of the historic environment to all locally available activities, and most especially those of touring, yoga and ecotourism, is indiscernible.

The NITB estimates that around 180,000 domestic and overseas tourists stay for short breaks and holidays that account for 500,000 overnights. This revenue benefits the numerous hotels, guest houses, hostels and self-catering accommodation including the exclusive Lough Erne Resort and Manor House Hotel. Based on the more detailed studies for other counties and allowing for the relative location and population, Fermanagh is likely to attract a further 144,000 day trippers and stays with friends and relatives. Most trips would be to Enniskillen and the Lough Erne area. The types of activities available locally, including especially historic heritage based tourism would tend to attract higher spend socio-economic groups. In 2009, annual tourism income from overnights was estimated by the NITB to be £507 million.

There are at least three local companies hiring cruisers at between £650 and £1500 per week and others offering boat hire from £85 per day. Boat hire often originates in the Republic given that the Erne is connected to the larger Shannon System via the Shannon-Erne

Waterway, a major public investment that reopened the system to navigation in 1994. There are also tentative proposals to reopen the Ulster Canal linking Upper Lough Erne with Lough Neagh, Waterways Ireland is a cross-border body charged with developing the sector. Its headquarters are in Enniskillen.

Cruising and angling are the main activities on Lough Erne itself. Waterways Ireland figures reveal that Ireland's boat owners make around 15 trips per year spending an average of £135 each time in 2006. Of these trips, around 30% were to the Lough Erne system which would suggest total direct expenditure of £11 million. The figure is broadly comparable if applied to the 5,000 plus boats registered on the Erne system.¹ There are no recent figures on the hiring of cruisers by tourists, although Marine Institute figures for 2003 indicate 5,700 cruiser and 7,300 motorboat rentals on inland waters by 37,000 people spending €13 million (£11.2m). Although tourist spending is likely to be higher than for boat owners, levels of inland cruising appear to have declined in recent years suggesting boat hires at £2 million plus local expenditure of €4 million (£3.4m) on the Erne applying the same proportion noted above for boat owners. Boat counts at Lock No. 1 on the Shannon Erne Waterway were 1108 up to September 2011, below the average of 3163 for the period since 1994.

Waterways Ireland reports do not identify the contribution of cultural heritage, but around £9,000 was paid for ferry trips to White Island, a sum only 50% in excess of the grant contribution, but sufficient to support a couple of boatmen. At least 40% of the 3,000 visitors were from outside of Northern Ireland and most could have been expected to stay overnight in Fermanagh. The same would be true of people ferried across to Devenish Island at a fee of £15. A greater proportion of more general tourist interests would have joined other boat tours of Lough Erne.

The seaplane heritage likely only attracts a minority of the visitors to Castle Archdale, but it is a unique chapter in Lough Erne's heritage that could be further developed. The Seaplane Festival attracted public and some private sector sponsorship, but could potentially be expended to draw in further revenue. Lakeland Seaplane Tours is, to an extent, sustaining this heritage and brings in 20,000 visitors per year. There is potential for collaboration with County Londonderry with regard to the naval heritage of Lough Foyle.

As regards specific attractions in the area, Belleek Pottery is the largest with 250,000 visitors each year. Although a commercial business employing over 600 hundred people and with an annual turnover of £60 million, the pottery's origins are firmly rooted in the local area along with the historical infrastructure. By comparison, Enniskillen Castle is a publicly owned site supported by the Council and attracting 40,000 visitors per year. There is a recognition of the need to provide significant revenue through admissions and events to minimise this contribution, but also an awareness that the museum must provide a service to the community that supports it, most obviously through heritage education.

Core financial input from public sources supported where possible through private sponsorship is essential. Often local initiatives are undertaken and marketed through the Fermanagh Lakelands website, for example the Discover Belleek Festival organised by the local chamber of commerce. Events generally can be effective in supporting existing attractions and bringing in revenue that benefits the wider community. Nevertheless, public funding is the foundation for the protection of and access to Fermanagh's historic environment. For instance, as well as Enniskillen Castle, Fermanagh District Council maintains Cole's Monument, an obelisk commanding an extensive view of the town, as well as taking responsibility for the maintenance of over 30 disused graveyards across the county. At Castle Archdale the revenue from the caravan park lease is significant, but remains a small in comparison with the core income from the NIEA. The economic contribution of one single facility to tourism and the economy in Fermanagh may be marginal, but the cumulative impact of the county's heritage to the tourism economy is clearly substantial even if not easily quantified.

¹ Boats of more than 10hp should be registered. On the ground surveys by Waterways Ireland indicate that there could be one third more boats than appear on the register. However, there is also the possibility of double-counting as boats move from one area to another.

4. Social and Environmental Benefits

Fermanagh is predominantly a rural county and attachments to community and culture are strong. For example, when local people in Aughakillymaude, overlooking Upper Lough Erne, got together to rescue and restore the 19th century school, they unwittingly provided a home to the Fermanagh Mummings, a resurrection of the folk tradition of straw men who now regularly perform throughout Ireland and who have become something of cultural ambassadors for Fermanagh.



In Belleek, the local community association got together to clean up and restore the Keenaghan Abbey ruins and cemetery with support from the Department of the Environment. The restoration required substantial time from volunteers, unpaid input from contractors and specialist input from local stonemasons. In Enniskillen, the aforementioned Headhunters Barber Shop and railway museum are examples of local people taking the initiative in preserving and making accessible the region's history.

The management of Enniskillen Castle are acutely aware of the importance of the ensuring that the museum has relevance to the local community. At least half of the museum's visitors are estimated to be local and family days, events and talks are held throughout the year. The Friends of the Museum has 400 members and is active in securing grant funding for exhibitions and the collections. Some events are provided for entertainment and to sustain revenue, while others such Connecting People, Places and Heritage, a cross-border project with County Cavan, the Taste of the Erne Festival in June 2011 and a planned collaborative exhibition on the Plantation estates are intended to strengthen local people's relationship with the area and its history. School parties are regular visitors and museum staff themselves present the programmes which are adapted to the curriculum. A Learning and Access Officer is employed to promote education to the wider community.

5. Best Practice

Ireland has quite a sophisticated cruising industry, but opportunities to leave boats have often been undeveloped and non-boaters'/non-anglers' relationship with lakes and rivers is sometimes neglected. In the Norfolk Broads many more activities are available, including more opportunities for cycle hire and short walking and cycle paths, pretty villages, museums, etc. However, the Broads is a larger destination, receiving two million visitors per year who spend around £600 million. The weather is kinder and rare wildlife a major attraction. The Broads do not have Fermanagh's rich early Christian heritage and can be quite congested.

The Foynes Flying Boat Museum provides an example of what could be achieved to draw on Lough Erne's wartime flying boat heritage. The museum is located in the original terminal building for these early commercial transatlantic flights and has a full sized replica of a B314 flying boat. A flying boat festival is held each year.

6. Conclusions

The District Council and tourism bodies are very conscious of the importance of the historic environment to the economic and social development of Fermanagh, to education and to the visitor experience. The attractions of Belleek Pottery, Marble Arch and the National Trust properties are well established. In addition, Enniskillen Castle is active in terms of heritage education, both for school children, but also in raising the profile of historic heritage for the people of Fermanagh.

Fermanagh Lakelands is actively promoting the attractions of the area as a joint product. There is greater potential in this regard. Fermanagh is already on the tourist map given the appeal of its natural environment and honeypot destinations such as Marble Arch Caves and Belleek Pottery, but there is a need to provide the facilities and means by which people can be encouraged to have hire boats to explore the wider area. There is much to develop and to market as themes to attract a wider range of visitors including the county's early Christian heritage and its unique seaplane heritage. There is also potential for a greater synergy in combining the natural and cultural heritage given that the historic remains and buildings are an inherent feature of the landscape. The benefits include economic growth and the stimulus to private investment as demonstrated by the presence of private attractions and by some recent hotel developments. More pro-active support and financing from national sources is needed to provide momentum.

There is an inevitable synergy between the protection of historic sites and the natural environment of Lough Erne. So many archaeological and historic features are an inherent part of the landscape integrating with local folklore and culture. Although the natural environment attracts some specialist interest such as angling, hillwalking, cycling, pony trekking, birdwatching and yoga, more general interests are attracted by both the natural and cultural environment. The gardens at Castle Coole are the first in the UK to have been selected as a Site of Special Scientific Interest.

Annex I: Waterways

Navigable inland waterways include the Shannon-Erne Waterway (63km County Leitrim to Fermanagh), the Lower Bann (51km) and short sections of the Lagan Canal as well as Lough Erne and Lough Neagh. Potentially, the remainder of the Lagan Canal and the Ulster Canal could be restored. A navigable link between Lower Lough Erne and Galway Bay has also been mooted.

To be precise most of the Shannon-Erne Waterway is located outside of Northern Ireland but the waterway connects Upper and Lower Lough Erne with the Shannon system via a network of canals and interconnecting lakes. The waterway began life as the Ballinamore-Ballyconnell Canal in 1846. It was re-opened in 1994 with EU assistance at a cost of £30 million. Although the waterway needed to be upgraded to accommodate modern leisure cruisers, much of the original lock stonework was retained. According to Waterways Ireland statistics, the Erne system has at



least 5,000 registered boats over 10hp while the Shannon system has over 8,000. Together they represent the over-whelming majority of leisure craft in Ireland. By providing a connection between the North and the South, the Waterway opened up a considerably larger area to navigation, particularly for Northern registered vessels. Around 1,500 boats each year pass through the No. 1 lock into Lough Erne providing significant tourism income. However, both the number of boats and cruising operators has fallen in recent years. Plans are currently underway to open up sections of the waterway as a canoe trail. The canal bank surfacing does not encourage walking, although the Inland Waterways Association of Ireland (IWA) provides information on walks in its vicinity.

The Lagan Canal was completed in 1793 and runs between Lough Neagh and Belfast. It follows sections of the Lagan River from Lough Neagh before breaking into an entirely artificially constructed channel from Union Docks. As well as the structure of the canal itself, there are lock bridges, keepers' cottages and 27 locks, each of which is a scheduled monument. There are also some surviving linen mill buildings along its route. An aqueduct crossing the Lagan River was demolished in the 1960s during the construction of the M1 motorway along with 12.5km of canal. The Lagan Canal fell into disuse in the 1950s. The Lagan Canal Restoration Trust was established to restore the canal and much work is being done using volunteers including members of the Inland Waterways Association of Ireland. Currently only a small section is navigable at Lisburn, although sections of towpath are open for walking.

The outflow to Lough Neagh is the Lower River Bann which is also a canalised navigation system connecting the lough to Portstewart on the north coast. On the far side of Lough Neagh, the Ulster Canal is, like the Lagan Canal, a disused waterway providing a connection to the Erne System in County Fermanagh via County Monaghan. If it were restored, a connection would be available from here to the larger Shannon system via the existing Shannon-Erne Waterway.



There are potential tourism benefits from canal restoration. British Waterways believes that 24,000 jobs are supported and that the hire boat industry contributes £61 million to the economy. Other estimates are larger. Visitor spend on the Kennet and Avon Canal in England has been estimated at £26 million per year based on 7.7 million visitors², a figure much larger than what is likely to be realised in Northern Ireland.

A socioeconomic study of the Ulster Canal by for the Blackwater Partnership (2006) estimated construction employment at 2,300-2,600 job years and predicted an annual tourism income of £3-4 million with wider economic benefits of £5-10 million. This would benefit communities along the route in an area that currently receives only modest tourism income, although the region does contain some the country's best coarse angling. Largely in view of the North-South benefits, a ministerial meeting in 2007 decided that restoration work was to commence. However, the direct return to the Exchequer was subsequently estimated at less than £1 million per year while the capital cost was put at £125 million. Given the high cost, the project has been deferred.

Nevertheless, canals have other economic merits. They are rather unique features in that they are linear examples of cultural heritage with an associated historic environment that includes buildings and other structures that are a legacy of the life and industry once found along their banks. Whereas the case studies in this report provide examples of a synergy with the natural environment and recreation, canals do so directly as a home for wildlife and in that they can be experienced through walking and cycling. Usually these activities include the potential to stop and enjoy historic features whereas, for canals, it is the feature itself that presents this opportunity. For example, a cycleway runs parallel to the Ulster Canal connecting historic features in Counties Monaghan and Armagh.

As such, canals provide additional personal welfare through active recreation and through the health benefits this confers. British Waterways estimates that 13 million adults visit canals (at least once) each year and that there are 20 million cycle visits. They argue that 60% of visitors believe they exercise more regularly due to the presence of a nearby canal. A study by Willis and Garrod (2001) of canal recreation in Britain arrived at a lower bound estimate of the total consumer surplus of between £41 million and £62 million based on 106 million adult and 27 child million visits per year. If applied to the length of navigable waterway in Northern Ireland, weighted by the density of waterways relative to population, these figures would equate to between approximately £7 and £11 million per annum or, potentially, £11 and £17 if the Lagan and Ulster Canals were restored (including a larger built heritage component).

In addition to the direct use benefits, the volunteer effort that goes into restoration provides significant social and community benefits while the restored canal itself contributes to local identity and pride. These social benefits along with the improved property values that typically follow restoration have often provide the basis for economic regeneration through both public and private investment. British Waterways estimate that £10 billion of regeneration has been achieved along it 2,200 mile network. Canals have often formed the centrepiece for new waterside development and regeneration as has occurred as Pelletstown in Dublin, but also within the centre of Lisburn on the Lagan Canal.

² British Waterways/ Ecotec 2003.

Table 2: Public and private benefits of canals and waterways

Benefits	Nature of benefit
Heritage re-use and conservation	Canal structure, lock keepers' cottages, bridges, mills, etc
Environment	Habitat for aquatic flora and fauna
Sense of place	Historic canal or waterways towns
Boat-based recreation	Tourist income and personal well-being
Bankside recreation	Visitor income, personal well-being and health
Volunteering	Personal well-being and skills development
Employment	Maintenance, management and tourism
Economic development and regeneration	From tourism income, maintenance and residential or commercial development
Political	North-South links

References

Blackwater Partnership, 2006. Ulster Canal: Socio-economic Study. Price Waterhouse Coopers.

British Waterways 2003. The Economic Impact of the restoration of the Kennet and Avon Canal, by Ecotec.

Willis, K. and Garrod, G. 2001, Valuing Open Access Recreation on Inland Waterways: On-site Recreation Surveys and Selection Effects. *Regional Studies*, 25 (6), pp511-524

BELFAST CATHEDRAL QUARTER CASE STUDY



Contents

1. INTRODUCTION.....	1
2. BACKGROUND.....	1
3. THE CATHEDRAL QUARTER'S CONTRIBUTION TO THE LOCAL ECONOMY	7
4. SOCIAL AND ENVIRONMENTAL BENEFITS.....	11
5. BENCHMARKING	13
6. CONCLUSIONS.....	16

1. Introduction

Cultural Quarters around the world are sources of shared identity, creativity, innovation and entrepreneurship. They provide an excellent venue for the arts and cultural sectors to interact and complement commercial and hospitality sectors. They are vibrant areas which deliver a unique visitor experience and develop a sense of shared culture for the public.

The Cathedral Quarter Steering Group (CQSG) vision and ethos are:

Vision: *“Belfast’s historic Cathedral Quarter is a focal point and leading destination for culture, enterprise and learning.”*

Ethos: *“The Cathedral Quarter contributes significantly and measurably to the economic, social and environmental well-being of its stakeholders, citizens, residents and visitors. The Cathedral Quarter upholds a sustainable balance between commercial and cultural, private and public interests.”*

In order to support the growth of the mixed use economy in the Cathedral Quarter a number of developments have been initiated. This includes the Royal Exchange, a mixed use site intended to bring commercial growth to the city centre and to the Cathedral Quarter.

This case study is designed to examine the issues surrounding the Cathedral Quarter’s current viability and the ability to meet its potential in the future.

2. Background

Belfast’s Cathedral Quarter is situated in the area bordered by York Street, Donegall Street, High Street and Dunbar Link (Refer to Figure 1, Page 4). The Cathedral Quarter extends out to the edge of what can be referred as the ‘*old merchant quarter of the city*’. The Cathedral Quarter’s five public squares comprise over 5000m² of public space i.e.

1. Custom House Square;
2. Cotton Court;
3. Writer’s Square;
4. Cathedral Gardens (Buoy’s Park); and
5. Saint Anne’s Square.

The Cathedral Quarter takes its name from Saint Anne's Cathedral, the 'ecclesiastical heart of the city'. The Cathedral Quarter is full of architecture, ranging from distinguished banks and public buildings, to pubs and restaurants. Some of these buildings, such as the Custom House and Saint Anne's Cathedral occupy prominent public locations but other buildings are tucked away down the narrow cobbled streets (Refer to photographs in Figure 2).

Culture is at the core of the Cathedral Quarter which has become a distinctive and diverse mixed use area. It is home to over a dozen established creative businesses and more than 50 art organisations, including theatre companies, filmmakers and youth orchestras.

Key milestones in the Cathedral Quarter's evolution are detailed in Table 1.

Table 1: Timeline of Key Events

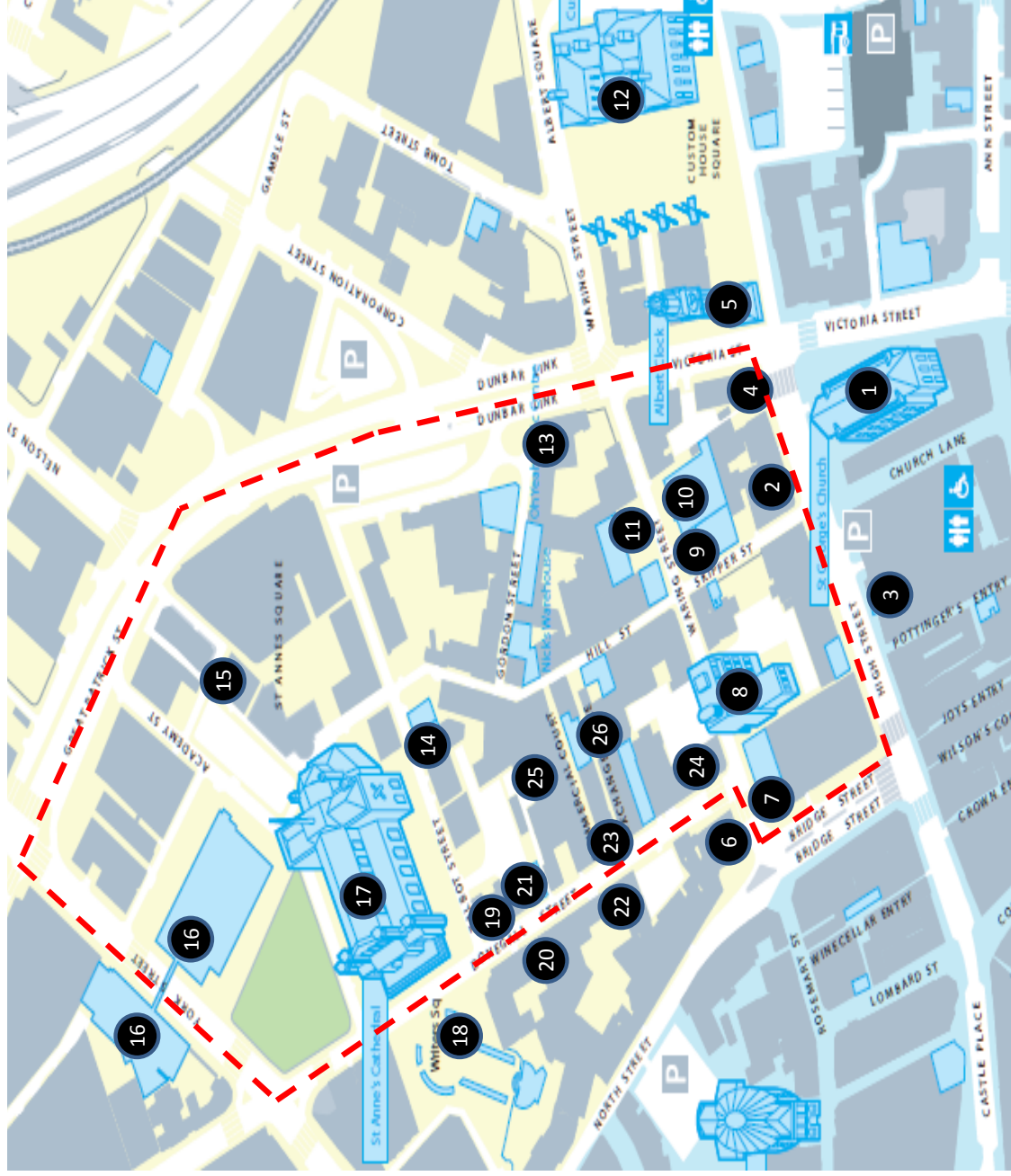
Years	Description	
1971-1979	Northside	Northside, as the current Cathedral Quarter was characterised back in the 70s by derelict warehouses, dilapidated buildings and deserted streets. There was high unemployment and poor quality housing. Various arts, business and government sectors recognised the area's potential and began putting the building blocks in place for improvement.
1980-1986	Wasteland	The area was a barren wasteland in the 80s. The urban environment was still dominated by derelict buildings and poor housing. In the late 1980s, playwright Martin Lynch, chef Nick Price and architect Barry Todd persuaded others to share their belief in the potential of the area.
1987	Laganside Concept Plan	In 1987 the Laganside Concept Plan was published. It explored ways of improving the River Lagan and areas alongside the river which had declined in economic importance.
1989	Laganside Corporation	The Laganside Corporation was formed by the government. Its purpose was to regenerate the Laganside area socially & economically.
1991-1999	Cathedral Quarter	The first 140 hectare area (for which Laganside had responsibility) was extended to include a part of the Northside as a strategic link to the city centre and the Cathedral Quarter was born lying to the North of the city centre. Laganside Corporation used government money as a catalyst to bring in money from private investors. Investment in employment and recreation was also encouraged.
2005	North East Quarter Masterplan	The Belfast City Centre Regeneration Policy Statement (RPS) was published in 2004. As part of the RPS, appraisals were carried out and the Masterplan for the North East Quarter was initiated. The Masterplan was issued in August 2005. The RPS regeneration objectives include: <ul style="list-style-type: none"> • <i>Put in place appropriate connections to the Cathedral Quarter, Laganside and the Victoria Square area;</i> • <i>Demonstrate its potential to pump prime the wider regeneration of the Cathedral Quarter;</i> • <i>Enable reciprocal benefit between the two schemes (i.e. Victoria Square and NEQ); and</i> • <i>Consolidate and enhance Castlecourt as a key shopping centre,</i>
2007	Laganside wind-down	Laganside wound down its operation in 2007. The department of Social Development (DSD) took on responsibility for management of assets, event funding and completion of key projects.

Years	Description	
2008	Cathedral Quarter Steering Group (CQSG)	The CQSG was established in 2008. It was funded by the DSD and had input from Belfast City Council and Belfast City Centre Management. The group's remit was to develop a 5-Year strategic vision and development plan for the area.
2011-2015	5-Year Strategic Vision & Development Plan Cathedral Quarter Trust Key Priorities	<p>Vision: "Belfast's historic Cathedral Quarter is a focal point and leading destination for culture, enterprise and learning". The CQSG, after (examining the area's potential to be a world class Cultural Quarter) set out to devise a plan for development.</p> <p>The CQSG calls for the establishment of a Cathedral Quarter Trust (CQT) to work on behalf of the community, stakeholders and the public to focus on strategic opportunities and implement the Development Plan.</p> <p>The CQT has four key priorities:</p> <ol style="list-style-type: none"> 1. To support the Cathedral Quarter as a centre for the arts and creative industries. 2. To support the growth of the mixed-use economy in the Cathedral Quarter. 3. To generate high levels of public participation. 4. To build and maintain a supportive infrastructure. <p>As part of Priority 2, the development of The <i>Royal Exchange</i> is proposed and is the largest regeneration scheme proposed in Ireland at over 82,000m² covering 12 acres.</p> <p>Aims</p> <ul style="list-style-type: none"> • To bring commercial growth to the City Centre and Cathedral Quarter. • Meet the objectives of the North East Quarter Master Plan.

a. Historical Assets within the Cathedral Quarter

Figure 1 illustrates the location of the historical assets in the Cathedral Quarter. Figure 2 provides a selection of photographs and Annex I provides a description of these buildings and their use.

Figure 1: Approximate Boundary Of Cathedral Quarter



No	Building
1	St Georges Church
2	The National Bank
3	St Georges Building
4	Transport House
5	Albert Memorial Clock
6	Assembly Rooms / Northern Bank
7	Commercial Buildings
8	Northern Ireland War Memorial Building
9	Ulster Buildings
10	Ulster Bank
11	Cotton Court
12	Customs House / Custom House Square
13	Former Corn Exchange
14	27 Talbot Street
15	Belfast Education & Library Board
16	The Art College
17	St Anne's Cathedral
18	Writers Square
19	Former Newsletter Building
20	North Street Arcade
21	The John Hewitt
22	16-18 Donegall Street
23	29-31 Donegall Street
24	1-3 Donegall Street
25	Commercial Court
26	Exchange Place

Figure 2: Selection of Photographs of Sites in Cathedral Quarter

 <p data-bbox="715 1704 746 1980"><i>Saint Anne's Cathedral</i></p>	 <p data-bbox="703 1151 735 1420"><i>Saint Georges' Church</i></p>	 <p data-bbox="715 658 746 837"><i>Custom House</i></p>
 <p data-bbox="1321 1659 1353 1980"><i>The Albert Memorial Clock</i></p>	 <p data-bbox="1326 1182 1358 1420"><i>The Merchant Hotel</i></p>	 <p data-bbox="1326 443 1358 837"><i>Concert, Custom House (Square)</i></p>

b. Local Tourism Performance

Recent figures highlight that NI's tourism performance has improved for the period **January to June 2011** when compared to the same period in 2010¹. Salient points to note include:

- NI residents took **758,000 overnight trips** within NI; with an associated spend of **£46 million**. In the same period NI residents took 3 million leisure day trips (of which 1 million were tourism day trips) within NI.
- The majority (69%) of overseas visitors to NI were from GB, 17% were from other European countries, 9% were from North America and 5% were from other countries
- **686,000 overseas visitors** spent at least one night in NI, an **increase of 11%** when compared with January-June 2010. **Overseas visitors spent** an estimated £165 million during the period, an **increase of 24%** compared with January-June 2010.
- An estimated 913,000 hotel, guesthouse and bed & breakfast rooms were sold, an increase of 3% when compared with January – June 2010.
- In June 2011, tourism and leisure jobs accounted for 8% of all employee jobs in NI (i.e. 54,000 jobs), the same proportion as reported in June 2010.

NITB's targets for 2020 highlight the focus on restoring tourism growth, to include:

- **A wealth generator:** The total revenue generated by the NI tourism industry will double to £1 billion.
- **A job creator:** 50,000 jobs will be sustained by tourism activity.
- **An export generator:** In 2020 whilst staying in NI visitors from outside the UK will generate £350 million. Visitors from out-of-state (including GB and RoI) will generate £750 million.
- Increase visitors to 4.5 million.

Belfast has established itself as one of Europe's top visitor destinations due to major investment in the past decade. The city has a rich legacy of Georgian, Victorian and Edwardian architecture, many of which have been revitalised in recent years. The city is also becoming a popular destination for cruise ships, 31 vessels visiting in 2011 to date, carrying over 38,000 passengers and crew.

Belfast has:

- A reputation as one of the premier business and conference locations within Europe;
- The Belfast Waterfront and the Odyssey which are established as world leading conference and exhibition venues;
- A business and conference market which accounts for 38% of all overnight visitors to the city;
- Premium hotel accommodation;
- Easy access to all main transport networks;
- Over 7 million annual visitor trips to the city with a spend of over £436 million in 2008. This was an increase of 39% from the previous year and helped support 24,838 full time jobs. In 2009 there were 9.3 million visitors with £451 million spend. This was an increase in visitors of 32% from the previous year and an increased spend of 3.4%;
- Out-of-state visitors represented 31% of visitor trips to Belfast and they contributed around 75% of overall net income in 2008; and
- 1.2 million out-of-state, overnight visitors in 2008 which contributed £268 million to the economy, their key expenditure being retail and accommodation (See Table 2).

¹ The Tourism Statistics Branch, Department of Enterprise Trade & Investment, Statistics Bulletin 'Tourism Performance Estimates NI January to June 2011.

Table 2: Out-of-State Expenditure Breakdown (2008)

	Expenditure	Percentage
Retail	£80.4m	30%
Accommodation	£77.7m	29%
Eating Out	£61.1m	23%
Entertainment	£29.5m	11%
Travel	£18.8m	7%
Total	£267.5m	

Belfast Events

Belfast has hosted a wide range of events, showcasing the city as an excellent travel destination for culture, enterprise and learning. The most recent international event was the MTV European Music Awards (EMA) in November 2011, which provided an excellent opportunity to showcase Belfast and Northern Ireland on a global scale.

“The MTV EMAs has put Belfast and Northern Ireland on a worldwide stage and given us the chance to champion it as a must-see destination within a new market of music tourist” (Director of Marketing, NITB)

Other major events hosted in Belfast include:

- The World Cross Country Championships;
- European Pipeband Championships;
- World Amateur Boxing Championships;
- World Irish Dancing Championships;
- Tall Ships Race;
- World's Strong Man Events;
- West Belfast Festival; and
- City Carnival.

Future events planned include:

- Spin off from the London Olympic Games 2012;
- Titanic Year Events 2012; and
- World Fire & Police Games 2013.

3. The Cathedral Quarter's Contribution to the Local Economy

a. Existing Infrastructure

Belfast's cultural renaissance has witnessed the arrival of a new generation of visitor attractions, hotels, restaurants and bars. It is embracing a 'café culture' adding to the vibrancy of the city. The city has a variety of cultural activities including classical and contemporary music, drama, literature, visual arts and many world renowned international festivals.

A keystone in the city's vibrant culture is the Cathedral Quarter. Previous developments such as Victoria Square, which opened in March 2008 has helped to increase Belfast's presence on the UK retail map and given a further boost attracting shoppers, tourists, conferences and investors.

The Cathedral Quarter's mix of activities extends beyond cultural production and performance to include: Hospitality; Leisure; Offices; Housing; and Retail. 20 restaurants, cafes, pubs and clubs and three new hotels (i.e. The Merchant Hotel; Premier Inn; and Ramada Encore) form the basis of the daytime and evening economy.

One of the priorities detailed within the "*Cathedral Quarter Belfast, Five-Year Strategic Vision and Development Plan, 2011 – 2015*") relates to economic sustainability, namely:

"Building and nurturing a dynamic local economy clustered around specialised creative and cultural enterprises and promoting the development of innovation, skills and knowledge"

The Cathedral Quarter is already a thriving hub of cultural activity with a wide range of events and festivals occurring on a regular basis. Saint Anne's Square at Talbot and Edward Street, which opened in 2009 comprises:

- 103 apartments;
- 169-room Ramada Encore hotel;
- 2800m² of bar & restaurant space;
- 1800m² of office space;
- 1300m² plaza for performing arts and events.

Recent residential developments within the Cathedral Quarter include:

- New construction at St Anne's Square;
- Custom House Square;
- Loft conversions in an old warehouse on Donegal Street.

Once fully occupied they will provide over 200 residences. The Royal Exchange, when completed will add another 200 residences. These existing residencies are contributing to the 24hr use of the area and will add to the local economy. Table 3 details a range of events and festivals which take place in the Cathedral Quarter.

Table 3: Cathedral Quarter Events and Festivals

Event	Details	Visitor No's	Admission / Attendance
Out to Lunch (January)	Running for 7 years this month-long programme of arts and music in the Cathedral Quarter is suitable for all ages	2011:10769 2010:9768 +10.25%	£5-£8
Belfast Nashville Songwriters Festival (February)	In its 7 th year Belfast Nashville Songwriters' Festival celebrates the art of song writing and the Sister Cities link between Belfast and Nashville. The Festival runs for 5 days during the month of February.	No Data Available	Free-£25
Belfast Children's Festival (March)	The 13th Belfast Children's Festival is packed with an international programme of music, theatre and art aimed at all ages.	No Data Available	Free-Low Cost
The Black Box Bacchanal (March)	Gives local artists and performers the opportunity to showcase their talent while mixing a few international acts into the event.	No Data Available	£3-£12
Belfast Film Festival (March / April)	The 11 th Belfast Film Festival is a two week annual event that promotes diverse and dynamic film and educational events and includes UK, Irish and European premieres, master-classes, local short film and documentary competitions. It also comprises of Drive -ins and the Lagan Boat screenings.	No Data Available	Free-£9

Event	Details	Visitor No's	Admission / Attendance
Festival of Fools (April / May)	5 day comedy Festival in its 8 th year is held between the Cathedral Quarter and the City Centre. It comprises of 75 artists from across Europe, America and Australia delivering 130 performances suitable for everyone.	42,000 (split across different venues in Belfast)	Free
Polish Cultural Week (May)	A 'Taste of Polska' returns to Cathedral Quarter as part of the fifth annual Polish Cultural Week. It is organised in partnership with Artsektka (NI's leading Ethnic Arts Organisation) It offers an opportunity to sample and experience Polish cuisine as well as other food from across the globe, music, dance and workshops and is suitable for all the family.	No Data Available	Free (Under 16's to be accompanied by an Adult)
Cathedral Quarter Arts Festival (April / May)	Now in its 12 th year the Cathedral Quarter Arts Festival is an 11-day festival of music, comedy, theatre, literature, circus and visual arts. One of the fastest growing arts festivals in the UK famous for its cutting-edge and eclectic programmes.	2011:7106 5 2010:6964 3 +2.04%	Free-£12
Pop-Up pick 'n' Mix Festival (June)	Showcases NI theatre and dance for the 4 th time. Comprising of 40 events including staged readings, mini plays, sneak peeks and performances suitable for everyone.	No Data Available	£5
Open House Festival (June)	The 13 th Open House Festival is a five day event in June that brings together the sound of folk, roots and traditional music. Also known as the Coors Light Open House Festival (one of the main sponsors along with the Arts Council of Northern Ireland) it offers a whole weekend of all-day open air concerts at Custom House Square. It is an event suitable for everyone.	No Data Available	Free-£38.50
Belfast Pride Festival (July)	Belfast Pride Festival is Ireland's largest Lesbian, Gay, Bisexual and Transsexual festival appealing to audiences of over 15,000 people in the summer of each year. It houses entertainment in Custom House Square as well as events at other venues across Belfast	No Data Available	Free
Belfast City Blues Festival (August)	Taking place in the Cathedral Quarter of the City, this is the third year of the festival which showcases local blues musicians as well as acts from the USA, England, Scotland and Ireland. Events such as blues cruises, afternoon gigs and night time shows are readily available.	No Data Available	Free-£25
Culture Night Belfast (September)	This evening gives people of all ages the opportunity to visit and experience galleries, historic buildings, artists' studios, cultural organisations, venues and churches.	No Data Available	Free

Other activities available in relation to the Cathedral Quarter include:

- Art Gallery Tour: Guided walking tours of the Cathedral Quarter galleries are available.
- The Farset Way Walking Tour: The most historic tour of Belfast which covers part of the Cathedral Quarter.
- Belfast Historic Pub Tours: This includes three pubs in the Cathedral Quarter, the Duke of York, the Front Page and McHugh's.
- The Ulster Architectural Heritage Society (UAHS): The UAHS promotes the appreciation and enjoyment of architecture in the nine counties of Ulster.

Based on the above, improvement in the monitoring of visitor numbers is required, as information is not collated for a number of events (Refer to gaps in information in Table 2). Although collecting visitor numbers this may not be practical in some cases, where there are opportunities to monitor footfall, it should be gathered, as it will provide operators with data to measure performance.

b. Future Investment

Mix-Use Developments

The Cathedral Quarter is the focal point for cultural activity in the city and as part of the continued regeneration of the area a number of on-going and projects are underway. These projects are intended to bring commercial growth to the city and the Cathedral Quarter:

Development	Location	Description	Target Audience
The MAC	Adjacent to St Anne's Cathedral	<ul style="list-style-type: none"> • Under construction • Due to open in 2012 • Includes two theatres • Three visual art galleries • A dance studio • Education, workshop & rehearsal spaces • Office and Residency 	<ul style="list-style-type: none"> • Attract more visitors interested in the arts • Educational institutions • Business needing office space • People requiring new homes
The Royal Exchange Development	North East Quarter	<ul style="list-style-type: none"> • Due for completion in 2018 • 82,000m² covering 12 acres • 39,000m² of retail and leisure space • 8600m² of office space • 930m² for arts and cultural use • 240 apartments • 700 underground car park spaces • 	<ul style="list-style-type: none"> • Consumers • Business • Leisure • People interested in the arts and culture • People requiring new homes
University of Ulster	York Street	<ul style="list-style-type: none"> • Facilities for 12,000 students 	<ul style="list-style-type: none"> • Student population • Associated businesses such as entertainment and leisure businesses.

The various regeneration developments are expected to bring vitality, growth and learning opportunities to the area. This will stimulate demand for improved public transport, public space, accommodation and amenities. The Cathedral Quarter's continued and growing reputation as a lively cultural quarter as well as being an excellent business and leisure centre is key to attracting future investment.

Enhanced Evening Economy

The main aims of Belfast City Council's 'Evening Economy More Time Campaign' are to:

- Increase trade in shops, cafés, bars, restaurants and private businesses.
- Drive and increase footfall in Belfast City Centre between 5pm and 8pm.
- Increase the attractiveness and vibrancy of the city centre.
- Create a pleasurable city centre experience for visitors and locals.
- Ensure that Belfast continues to develop into a vibrant cosmopolitan European city.

4. Social and Environmental Benefits

One of the priorities within the "*Cathedral Quarter Belfast, Five-Year Strategic Vision and Development Plan, 2011 – 2015*" relates to social sustainability i.e.

"Building community cohesion, civic engagement and a celebration of diverse identities; promoting a sense of belonging and connectedness and reducing social alienation and exclusion in our city through participation in cultural life"

Based on a review of activities and regeneration within the Cathedral Quarter it is evident that the area contributes towards achieving this priority and generating the following social benefits:

- **Increasing Civic Pride & Well-being –**
 - The Cathedral Quarter serves as a focal point for cultural activity, which generates confidence in the local area and promotes civic pride arising from the regeneration of the area itself.
 - The social value of the historic buildings located in the Cathedral Quarter being so common place makes it an attractive place to live and socialise in. This encourages community harmony, health and well-being which lead to a better quality of life.
 - It can create opportunities for social interaction and brings together a wide-range of individuals for personal and business purposes.
 - This area encourages participation and advances social well-being through a wide variety of programmes and cultural activities and creates links between local communities contributing to a sense of inclusion, civic pride and identity.
 - The development of the Royal Exchange will further enhance the appearance of the area through regeneration and bring a sense of pride and confidence to the local community and city as a whole.

- **Celebrating Culture & Heritage –**
 - By protecting historic buildings this will ensure that these assets will be maintained for future generations to appreciate.
 - The Cathedral Quarter plays an important part in educating communities. Each strand of activity presents unique challenges and opportunities to the people that live there and socialise/work in the area e.g. cross-community partnership working to develop/regenerate the area; and partnerships working to facilitate/host events.
 - The built heritage associated with certain buildings in the Cathedral Quarter provides the community with a sense of identity and a shared history. It also provides an interesting tourism product in which to promote Irish history and architecture thereby attracting visitors resulting in increased visitor spend and investment in the area, benefitting the wider community.

- **Enhanced Community Relations –**
 - This area encourages participation and advances social well-being through a wide variety of programmes, cultural activities and events. It builds ties between local communities and contributes to a sense of inclusion, civic pride and identity.
 - The Cathedral Quarter provides a wide range of opportunities for volunteers e.g. supporting events, volunteer work within not-for-profit making organisations located in the area. By up- skilling and increasing the capacity of individuals' which will contribute to enhanced personal well-being and transferable skills for future employment. In addition, volunteering will provide opportunities for people, especially young people to come together and work towards a better future and common goal.
 - Working together will encourage young people to visit and become involved in the different aspects of the Cathedral Quarter. This has a positive effect on reducing youth crime. It causes a distraction from criminal activity while increasing awareness and appreciation therefore building self-esteem.

- People become aware of the effort and hard work that goes into development of these areas and while it promotes everyone working together it also makes everyone share the responsibility of the area.
 - Job creation in the development of projects like the Royal Exchange/Cathedral Quarter lead to an inner confidence in people who may be currently unemployed.
- **Increasing Cross-border Partnership –**
 - Promoting the Cathedral Quarter as a combined tourism product across the island of Ireland will enhance cross-border relationships.
 - Its city centre location makes it an important shared space. It is accessible to all communities North and South and creates opportunities to function as a central hub.

One of the priorities within the “*Cathedral Quarter Belfast, Five-Year Strategic Vision and Development Plan, 2011 – 2015*” relates Environmental Sustainability i.e.

“...promoting sustainable and human scale development; respecting global inter-dependence; promoting low-impact forms of transport; reducing waste and energy use; preserving the historic nature of the area; re-using buildings.”

The area contains a number of buildings that have been listed for their “Architectural” and/or “Historic” interest. The protection of buildings of special architectural or historic interest by Listing imposes restrictions on developers including the requirement that any alteration which affects the character of the structure, internally and/or externally, must have attained the consent of NIEA prior to the commencement of any works.

This requirement is enshrined in legislation as Article 43 of the Planning (NI) Order (1991) and is known as Listed Building Consent. The restoration or development of Listed Buildings is managed by the Planning Service, through the planning application process which is applicable to all proposed developments.

Quantifying social benefits in monetary terms - an example about St Anne's Cathedral Square

A specially designed economic valuation study was implemented to estimate how residents value the social significance of St Anne's Cathedral Square (Alberini et al, 2003)². This study elicited individual's preferences for the cultural and historical significance of St. Anne's Cathedral Square, which faces the Cathedral.

The survey asked respondents to choose between pairs of regeneration projects for either St. Anne's Square or an unnamed, abstract (computer-generated) square, designed to be identical to St. Anne's in all respects except for the cultural and historical dimension. Regeneration projects were defined by four attributes:

- i. The height of buildings;
- ii. The relative amount of open space compared to built space;
- iii. Their use (split between retail and residential); and
- iv. The cost to the respondent of the regeneration project.

² Alberini, A., Riganti, P. and Longo, A. (2003) ‘Can People Value the Aesthetic and Use Services of Urban Sites? Evidence from a Survey of Belfast Residents’, *Journal of Cultural Economics*, Volume 27, Number 3-4, 193-213.

In total, there were 72 regeneration alternatives.

In attempting to determine if preferences change due to the significance or uniqueness of the asset, regeneration projects were presented as hypothetical transformations. As the two alternatives are designed to be identical in all respects except for the cultural and historical dimension, differences in preferences between the two squares can be ascribed to these attributes.

254 people were interviewed in Belfast city centre in December 2001 for the survey, generating 244 usable responses. The sample population was similar to the population of Northern Ireland, with an average respondent age of 36 years and average household income of £16,000 a year. The survey featured two sub-samples: one in which respondents were asked about the transformations of St. Anne's Square, and the other in which respondents were asked about transformations to the abstract square. The sub-samples were not statistically different in most variables, except for income, gender and educational attainment.

The analysis suggests that **respondents prefer regeneration alternatives for St. Anne's that entail more open space** (specifically, increasing open space by 50% increases the probability that a respondent will choose a project by 25%), **maintain the current height of buildings (six storeys) and increase residential use of buildings**. In contrast, open space is not statistically significant for projects in the abstract square, while those which increase residential buildings are less preferred.

The study therefore illustrates how the heritage value associated with an area or feature can impact individual's preferences, and thus their economic valuation of it. This value must therefore be carefully considered when regenerating or redeveloping an area.

5. Benchmarking

The Cathedral Quarter Trust and other key stakeholders should undertake a robust benchmarking exercise of other cultural areas in order to reflect local and international best practice in the future development of the Cathedral Quarter.

Discussion with Cathedral Quarter Chairman and the Development Manager highlighted Temple Bar (Dublin) and The Northern Quarter (Manchester) as possible benchmarks against which the Cathedral Quarter could be measured. Manchester's Northern Quarter was voted UK's best Neighbourhood Award 2011 (organised by the Academy of Urbanism³). The Cathedral Quarter and Pollokshields in Glasgow were runners-up in the competition. Criteria used included: Governance; Local Character and Distinctiveness; User Friendliness; Commercial Success and Viability; Environmental and Social sustainability; and Functionality.

Annex II provides an overview of Temple Bar and The Northern Quarter in comparison to the Cathedral Quarter, in terms of: vision and priorities; visitor numbers/trends; promotion and news; events and festivals; signage and transport; commercial and hospitality sectors and future investment. Salient points to note include the following.

Overview & Key Offerings

- The Northern Quarter, known as 'the creative quarter', is a cultural hub of 'quirky' shops, art galleries, creative agencies, craft & design, Flower market, Farmers market, Fashion market and Street Art. It is also known as being a 'Mecca for DJs'.

³ <http://www.academyofurbanism.org.uk/>

- The Cathedral Quarter also has a good mix of vibrant cultural areas with five public squares, a mix of creative businesses, theatre companies, restaurants and bars. The area has sufficient variety to meet the aspiration of being a cultural hub. Lessons can be learned from the range of activities/events and degree of vibrancy in the Northern Quarter in order to appropriately develop the Cathedral Quarter in the future. The Cathedral Quarter Trust may also wish to further investigate the Northern Quarter's reputation as being a 'Mecca for DJs' and maybe promote its own strengths as being a vibrant area for music.
- A Report commissioned by Temple Bar Traders in 2011 compared Temple Bar with other areas of "cultural regeneration" in Europe, Australia, and the US. Among the report's recommendations are that Temple Bar should have:
 - a greater number of creative and visual artists working and living in the area;
 - more cultural activity in the evening; and
 - more interaction with institutions such as Trinity College and City Hall.

Belfast's Cathedral Quarter can learn from such reviews/reports in order to enhance the evening and night time economy as well as maintaining the creative artists in the area hence retaining cultural vibrancy.

Vision and Priorities

- As with the Temple Bar and the Northern Quarter, the Cathedral Quarter vision is to be an area of culture, supporting creative businesses in close proximity and complimentary to professional, retail and entertainment venues.
- Belfast's Cathedral Quarter is continuing to grow and develop and it is important that the Cathedral Quarter Steering Group and Steering Quarter Trust hold to their vision: "*Belfast's historic Cathedral Quarter is a focal point and leading destination for culture, enterprise and learning*"
- Temple Bar celebrated 20 years of rejuvenation in July 2011. The Cathedral Quarter could learn from the progression of Temple bar over this 20 year period, avoiding perceived pitfalls and building on positive elements. NB. Pitfalls experienced from the growth in Temple Bar relate to the presence of high-density mixed-use facilities, where there has been conflicts of interest, increased rents, anti-social behaviour and a 'run-down' appearance of some streets, squares and buildings. It is important that the Cathedral Quarter manage the growth of the area and ensure that its development does not have a negative impact on local residents businesses in the area, with the night-time economy adding to anti-social behaviour and noise pollution.

Visitor numbers/trends

- In 2009 there were 9.3 million visitors to Belfast of which 2.8 million were out of state visitors contributing 338 million pounds to the local economy (£120 per person). The spend ranged from retail, accommodation, eating out, entertainment and travel (Northern Ireland Tourism statistics branch). This compared to Temple Bar 3.5 million tourist visits in 2010 generating 1 billion euro to the local economy (€285 per person)⁴. In 2009 there were 97.9 million visitors to Manchester generating £5.4 billion to the Greater Manchester economy (£55 per person)⁵.
- It is recommended that an in depth review of visitor numbers and spend is carried out to identify the key areas of spend differential for comparative purposes⁶. It is essential that the true economic

⁴ Fáilte Ireland Dublin Statistics 2010

⁵ Office of National Statistics and Marketing Manchester Facts and Figures

⁶ It is acknowledged that the formulae for calculating visitor numbers and spend may be different in each region, therefore it is important to be cautious when comparing statistics, however these figures do provide an indication of differences for the purpose of this high level review.

impact and opportunity cost to other areas is carried out in order to establish a realistic visitor impact. The figures for Belfast appear more reasonable than the comparable however it may be that areas, such as Temple Bar, have a larger spend per visitor due to overnight stays, which should also be investigated.

Promotion

- Temple Bar has been promoted and growing for this past 20 years, and is renowned as one of the key places for tourist to visit when in the city.
- As previously references, The Northern Quarter was awarded UK's best Neighbourhood Award 2011, the Cathedral Quarter Belfast being in the final three nominees. A review of the criteria used and the performance within each criterion should be undertaken in order to highlight possible areas of improvement. It may be that The Northern Quarter's so called 'Mecca for DJs' and the array of street art and 'quirky retailers' provided a more 'Urban' feel. Belfast's Cathedral Quarter may wish to progress further in this area and promote this accolade.
- The Northern Quarter was recently cited in national and international headlines, as it provided the backdrop for key sequences in the Captain America motion picture. Belfast hosted the EMA MTV Music Awards in 2011, which was regarded a great success and showcased Belfast and areas such as the Cathedral Quarter. There is no disputing the positive impact of such events in a city and it is clear from a review that a lot of work has gone in to developing events and festivals in the Cathedral Quarter area.

Signage and Transport

- Temple Bar area is a pedestrian friendly area with cobbled stoned streets and with close proximity to the Luas line, city centre buses and cycle hire venues.
- The Strategic Plan for Manchester City Centre 2009-2012 and The Belfast Metropolitan Transport Plan and the Public Realm Master plan for Belfast have highlighted that buses and private cars having access to the cultural area act as a barrier to free pedestrian movement in that area. Consequently this detracts from the pedestrian footfall in the area and hence visitor spend.

Commercial & Hospitality Sectors

- Belfast's Cathedral Quarter has a wide mix of Commercial and Hospitality Sectors together with retail, art, theatre and creative businesses. In order to maintain this mix it is important that rents remain in control. As with any successful area, rent goes up as competition for space increases. As rent increases the more creative, theatrical type businesses are forced to the margins and the area loses its vibrancy and becomes less of a cultural area.
- The Temple Bar Trust has been involved in a number of high-profile rent disputes in 2011. The manager of music venue the Button Factory, which entered examinership in February 2011, cited excessive rents as one of the reasons behind the venue's financial troubles.

Future Investment

- The Cathedral Quarter has a number of regeneration projects underway to include The MAC, Royal Exchange Development and the University of Ulster Development, which will bring 12,000 students into the area.
- This will be very positive for the area and will increase the footfall in the area, also adding to the area's vibrancy and evening/night-time economy.

6. Conclusions

The vision for the Cathedral Quarter is that of a thriving cultural hub. Three crucial inter-related aspects serve as the guiding principles which underpin the strategy (the triple bottom line of sustainability):

- Economic Sustainability
- Social Sustainability
- Environmental Sustainability

The Cathedral Quarter has not yet reached the critical mass of footfall and other activities/facilities are needed to offer a consistent visitor experience.

The Cathedral Quarter has a vast array of events and festivals, celebrating the city's culture and heritage. As with most cultural quarters, rents tend to go up as the area becomes more popular and arts and creative people are forced out to the margins. This consequently has an adverse effect on the cultural hub and the vibrancy of the area. It is important that the cultural identity of the area is sustained by providing controlled rents and open spaces for arts and culture.

Therefore, the redevelopment of this area must be considered on an area wide basis with the development of a detailed Masterplan, which considers the scope and potential to change the modes of transport in the area and promote low-impact forms of transport. One way of achieving this may be by changing the priority of traffic movements from vehicles to pedestrian/cyclists, thus making more attractive to pedestrians and encouraging a larger footfall into the area. This approach is currently being adopted elsewhere in Belfast City Centre.

Annex I: Cathedral Quarter Historic Heritage Buildings and Sites

Map Key	Historic Asset / Location	Description
<p>High Street: This was Belfast's main street, usually called Front Street or Fore Street in the seventeenth century. The open river Farsset flowed down the middle until the mid-1800s. The name Belfast comes from the Irish, Beal Feirste – 'mouth of the Farsset'. Bridges once spanned the river at Church Lane, Skipper Street and Bridge Street. On maps of 1680 and 1685, the street took the form of quays on both sides of the river, crossed by a series of small bridges.</p>		
1	St George's Church 1811-16 (Listed)	The oldest Anglican Church in use in the city of Belfast, with records going back as far as 13th century, when a 'Chapel of the Ford' stood here. It has a simple nave and chancel plan and was built mainly of sandstone. It was built in the classical style in 1816. The church contains the oak chair used by King William when he prayed at the old church on his way to the Battle of the Boyne. Today the Parish Church provides religious services and hosts music events and concerts regularly
2	The National Bank c1890 (Listed)	Designed by William Batt, this was one of the few buildings in the street to survive the 1941 Blitz. Originally designed and planned for the purpose of a bank. The building will be converted into a hotel and tea rooms currently on 60 High street Belfast.
3	St Georges Building 1881 (Listed)	In 1910 number 43 was home to the Ulster Overcoat Company which produced the 'Ulster Overcoat', made famous by Sherlock Holmes and Billy Connolly. St George's Hall served as Belfast's first full-time cinema, showing 'Bluebeard' to an audience of 1500 in 1908. The building is currently privately owned and leased as retail and office accommodation.
4	Transport House 1959 (Listed)	Transport House is the Belfast headquarters of the Amalgamated Transport and General Workers' Union. Built in 1959, in the International Style. It is one of Northern Ireland's youngest listed buildings. It was designed by J.J. Brennan and displays a highly distinctive coloured tile mural containing an airplane, ship, cranes, and factory and marching workers. Transport House appears as two conjoined blocks. It became an important focus for the trade union movement. Still currently the headquarters of the Amalgamated Transport and General Workers Union in Northern Ireland, Transport House is soon to be restored by UNITE (Britain and Ireland's biggest union).
5	The Albert Memorial Clock 1865-69 (Listed)	The sandstone memorial originally was designed as part of a competition funded by public conscription to honour Queen Victoria's consort, Prince Albert. Belfast's own 'Leaning Tower' was designed by William J Barreil was constructed between 1865 and 1869 by Fitzpatrick Brothers builders. It obtained its nickname after developing a pronounced lean, due to being built on wooden piles on reclaimed land, but was stabilised by a refurbishment in 2002. Historical monument and time identifier. It is also a tourist attraction.
<p>Waring Street: This street appeared on the maps of 1680 and 1685. Then called Broad Street, it was renamed Waring Street after the tanner William Waring. It had become the trading centre of Belfast by the mid-19th century and a busy commercial street, containing milliners, tailors, estate agents, shipping agents, stationers, solicitors and printers. In 1840, five out of six fish merchants listed in the street directory were in Waring Street. Sugar refining premises were opened by George McCartney and by 1683 sixty tons of sugar were being processed each year. Sugarhouse Entry is the only remnant of the older street pattern between High Street and Waring Street.</p>		
6	Assembly Rooms / Northern Bank 1769, 1776, 1845	This is the oldest public building in Belfast built it 1769. The first floor assembly rooms were added in 1776 to the single storey market house. Many famous events were held here, including an influential festival of Irish harpists in 1792. Local United Irishman leader Henry Joy McCracken attended that festival with the leader of the revolutionary group, Wolfe Tone. Just six years later

Study of the Economic Value of Northern Ireland's Historic Environment - Cathedral Quarter

Map Key	Historic Asset / Location	Description
	(Listed)	McCracken was condemned to death in the same building. It was converted to a bank in 1845 by Sir Charles Lanyon. All milestones out of Belfast were once measured from here.
7	The Commercial Buildings 1819-22 (Listed)	Built by public subscription, the Commercial Buildings were designed by John McCutcheon to provide "an excellent commercial hotel, a spacious and handsome newsroom and a piazza for the use of merchants". The three-storey classical building closes the vista from Donegall Street. Built from grey Dublin granite. It is from here that the Northern Whig was reeled off from 1921-1963. After this it fell into a state of disrepair. Northern Whig House as it is known today is one of Belfast's oldest commercial buildings. The building was rescued in the 1990's where it is currently used partly as office accommodation and partly as a Bar and Restaurant called "The Northern Whig".
8	The Northern Ireland War Memorial Building 1955	Built as the result of an architectural competition, the ground floor is set behind distinctive square, dark grey piloti or pillars. The interior contained a museum, shrine and Hall of Friendship before it was transferred to Talbot Street. The purpose of the war memorial is to be an enduring memorial to those who fell in WW1 & WW2, to provide offices for the Royal British Legion and other ex-service charities and to commemorate the association of USA armed forces with Northern Ireland in WW2. The building is currently used as office accommodation.
9	Ulster Buildings 1869-70 (Listed)	The three-storey beige sandstone building is by Thomas Jackson & Son. Set on a grey granite plinth with curved end bays, this building shows great respect for its neighbour. A plaque over the entrance features the red hand of Ulster. The building is currently used as Bar called "The Cloth Ear" which is part of the Merchant Hotel development.
10	Ulster Bank 1957-60 (Listed)	This Italianate Victorian bank was designed by the young James Hamilton of Glasgow. In the 1850s, this Waring Street/Donegall Street area was the undoubted commercial centre of town. The banks were adopting an image of confident and solid respectability. This was Ulster bank headquarters until 1999 when they moved to new offices near City Hall. But the Ulster Bank headquarters (a Grade A building) has been carefully converted into a five star hotel – the Merchant opened in April 2006. The old banking hall has been converted to a spectacular restaurant. The building has been extensively developed and is now known as "The Merchant Hotel"
11	Cotton Court 1800-1819 (Listed)	In the first half of the 19th century the cotton industry boomed. The Cotton Court warehouse was a hub of industry now houses the Belfast Print Workshop and gallery among other things. The area in front is overlooked by the Pothouse bar and provides much needed respite and performance space in the city centre. This large building currently provides mixed used development including a number of bars, restaurants and offices, graphic designers, Craft NI and Belfast Print. The open space to the frontage of the building has been maximised by utilisation as a piazza for exterior dining providing a cosmopolitan atmosphere.
12	Custom House / Custom House Square	Built in 1856-57 by Sir Charles Lanyon. It is a building in the High Italian Renaissance or "Palazzo" style and referred to the finest neoclassical building in Belfast. This elegant building conveys the power of the British Empire under Victoria and the commercial success of Belfast as it expanded rapidly in the 19 th century. The steps of the Customs House formerly distinguished themselves as the chosen forum for public debate and for many years religious, political and social speakers addressed audiences here up to the 1950s. Since 2005 Custom House Square has been known as Belfast's premier outdoor event space. The front of the building is used as a public open amenity space on a daily basis.
Gordon Street: This early route off Hill Street was occupied by coopers and publicans and was probably named after John Gordon , an agent of Lord Donegall.		

Study of the Economic Value of Northern Ireland's Historic Environment - Cathedral Quarter

Map Key	Historic Asset / Location	Description
13	Former Corn Exchange 1851 (Listed)	Designed by Thomas Jackson this building was erected by a company of the grain merchants of Belfast. This plain two-storey sandstone building is on the edge of the Cathedral Quarter used to have shops below a lofty first floor hall. Crossed sheaves of corn are carved in the central panel on the gable of this building. The building is currently used as office accommodation.
Talbot Street		
14	27-37 Talbot Street 1890 (Listed)	This four-storey red brick warehouse with rounded bull nose edges to the windows and a diaper brick pattern on top. The building is currently used as a mixture of residential, office, and retail accommodation including the restaurant "No.27 Talbot Street".
Academy Street: Tucked behind the Cathedral, after Exchange Street West, this street is named after the nondenominational Belfast Academy established here in the 18th century		
15	Belfast Education & Library Board 1899-1901 (Listed)	Kirker, Greer and Co distillers and blenders built this warehouse. Their monogram is above the door. The design of arched parapets and turrets with lanterns make it a distinctive building. The building currently houses the Belfast Education & Library Board Head Office
16	The Art College	This building is an impressive red brick building with sandstone detail. Originally built as a department store for the Co-operative, in 1965 the building attached, The Warwick Building, was built by Belfast City Architects in the 'International Style'. Currently the art college is part of the university of Ulster; there are proposals to extend the University of Ulster facilities in the Cathedral Quarter with an investment of £250M and relocation of the majority of students from the Jordanstown Campus to Belfast.
Donegall Street: The eastern boundary of Cathedral Quarter, this street has some of the most impressive buildings and has played host to several industries including newspapers, solicitors and iron mongers. The area is planned for regeneration as part of the Royal Exchange project, a joint initiative between the Department of social Development (DSD) and private developers.		
17	St Anne's Cathedral 1904 – present (Listed)	St Anne's Cathedral, also known as Belfast Cathedral, is built on the site of the former Church of St Anne, which was founded in 1776. Among many notable features is a mosaic commemorating the 1500 th anniversary of St. Patrick coming to Ireland and the Baptistery ceiling which contains over 150,000 pieces of mosaic. In April 2007 a 40-metre stainless steel spire was installed on top of the cathedral, the "Spire of Hope" is illuminated at night and is part of a wider redevelopment planned for the Cathedral Quarter.
18	Writers' Square	Writers' Square is public open space located opposite St. Anne's Cathedral and offers an open area, of approximately 1,370m ² and capacity of 1,000, for performances in an accessible city centre location. The Cathedral Quarter Arts Festival takes place in May each year, with Writers Square hosting performances.
19	Former Newsletter Building 1872 (Listed)	The Former Newsletter Building is a highly ornamental late Victorian Gothic sandstone building with roundels that depict the heads of literary men and women, which once housed the Newsletter newspaper, established in 1737, which was an organ for liberal Presbyterian and became the voice of the Ulster Unionists. The area is also home to other newspapers with the Belfast Telegraph and Irish News nearby. Today the building retains its original use as office accommodation being the Belfast office of Willis & Company Ltd Insurance Brokers.
20	North Street Arcade 1936 (Listed)	The Listed North Street Arcade building running from Donegall Street to North Street was constructed in 1936 and is considered an architecturally significant building. It was seriously damaged by fire, widely believed to have been arson, in April 2004 and remains in its fire-damaged state. The site of North Street Arcade is included within the North East Quarter Masterplan for

Study of the Economic Value of Northern Ireland's Historic Environment - *Cathedral Quarter*

Map Key	Historic Asset / Location	Description
		redevelopment. Private Developers and DSD have signed a development agreement for the regeneration of this part of Belfast with a Planning Application being lodged in 2010 for the redevelopment of the North East Quarter (including North Street Arcade) known as the Royal Exchange.
21	The John Hewitt 1870 (Listed)	The John Hewitt is a bar in Donegall Street named after the renowned Northern Irish poet who died in 1987. The bar is owned and operated by The Belfast Unemployed Resource Centre. The Resource Centre's managers had previously relied on various grants to fund their work; however in the mid-90s they opened the John Hewitt to generate their own funds. John Hewitt, the late poet, socialist and Freeman of Belfast officially opened the Resource Centre on Mayday 1983. The building once housed the printing machinery of the News Letter Newspaper (Former Newsletter Building is adjacent) and is known as a hot bed for cultural debate, traditional music sessions and cultural events including the annual Open House Traditional Arts Festival.
22	16-18 Donegall Street 1879	This four storey stucco building retains many original details including pallisters (flattened columns) and fascias and was home to the Linine and Damask manufacturers Murphy and Orrhad at number 18. The building is currently used as office accommodation including PS ² (Paragon Studios / project space) which is a small artist collective, with studio space in the centre of Belfast. Alongside the studio space, PS ² uses a former shop, project space, on the ground floor of the building as a platform for art projects and cultural activities which are often located at fringe locations around the city. The focus of PS ² is on urban intervention and social interaction by artists, urban practitioners, multidisciplinary groups and theorists. PS ² is run on a voluntary, non-commercial base, supported by funding from the Arts Council of Northern Ireland and other sources.
23	29-31 Donegall Street 1895	This four storey red brick building with diapered gable of brick and terracotta squares was designed by William Batt is located adjacent to Commercial Court and is currently used as office accommodation with the ground floor used as the office of Estate Agents Macfarlane ad Smyth Estate Agents and Chartered Surveyors.
24	1-3 Donegall Street 1867-72, 1876 (Listed)	This distinctive four storey stucco curved corner building acts as a gateway to Donegall and Waring Street in an area historically known as the Four Corners. A hotel and bar complex has been recently constructed, utilising and maintaining the existing façade and character of this important building. The bar of this development is named "The Four Corners" in memory of the historic importance of this building.
Commercial Court		
25	Commercial Court	Commercial Court is a cobbled street running from Donegall Street to Hill Street in the Cathedral Quarter that provides a vibrant area housing a diverse range of businesses including solicitors, cafés, the offices of the Sunday World newspaper and the Duke of York bar. Home to Ireland's first penny newspaper, the Belfast Morning News (incorporated into the Irish News since 1892), in the 1860s, it was the best-selling newspaper in Ulster. Ironfounder Stewart Hadski leased ground at what is now Commercial Court and an entry to the "Old Foundry" is shown on the 1791 map. Printers' Café now sits snugly on the edge of this entry, where a fluted conical corner bollard on one side and a half cylinder of iron on the other can still be seen that were designed to protect the buildings from cartwheel damage.
Exchange Place		
26	Exchange Place	This entry was in existence in 1819. An iron cannon acted as a corner bollard here before being removed in 1993. The dark red brick buildings at 2-6 Exchange Place have a partly curved façade.

Annex II: Benchmarking Overview: Comparing the Belfast Cathedral Quarter to Dublin Temple Bar and Manchester Northern Quarter

Temple Bar - Dublin	Northern Quarter - Manchester	Cathedral Quarter – Belfast
Overview		
<ul style="list-style-type: none"> • An area on the South bank of the River Liffey, Dublin • Known as Dublin's 'Cultural Quarter' • In July 2011 Temple Bar celebrated 20 years of regeneration <p>Public squares:</p> <ul style="list-style-type: none"> • Temple Bar Square • Meeting House Square <p>Home to:</p> <ul style="list-style-type: none"> • Irish Photography Centre • Ark Children's Cultural Centre • Irish Film Institute • Temple Bar Music Centre • Art house Multimedia Centre • Temple Bar Gallery & Studio • Project Arts Centre • Gaiety School of Acting • IbaT College • Irish Stock Exchange • Central Bank of Ireland 	<ul style="list-style-type: none"> • Known as 'the creative quarter' Manchester, UK. It is generally marked out between Piccadilly, Victoria and Ancoats, and centred around Oldham Street, just off Piccadilly Gardens. <p>Home to:</p> <ul style="list-style-type: none"> • Fashion designers • Creative agencies • Craft & Design • Art galleries • Quirky retailers • Flower market • Farmers market • Fashion market • Street Art • Piccadilly Gardens <p>The area is known a 'Mecca for DJs', with shops such as:</p> <ul style="list-style-type: none"> • Piccadilly Records • Vinyl Exchange • Vox Pop Records, • Beatin' Rhythm • Eastern Bloc Records 	<ul style="list-style-type: none"> • Belfast's Cathedral Quarter is situated in the area bordered by York Street, Donegall Street, High Street and Dunbar Link <p>There are five public squares:</p> <ul style="list-style-type: none"> • Custom House Square • Cotton Court • Writer's Square • Cathedral Gardens (Buoy's Park) • Saint Anne's Square <p>Home to:</p> <ul style="list-style-type: none"> • Churches • Distinguished Banks • Listed Buildings • Hotels and bars • Restaurants • Dozens of creative businesses • Theatre Companies • Film makers • Youth Orchestras • War Memorial Building • St Anne's Cathedral • Writer's Square • North Street Arcade • Exchange Place and much more
Vision and Priorities		
<p>Temple Bar Cultural Trust: <i>'Our mission is all about supporting culture in Temple Bar. Our work happens here in Temple Bar but it has impact in other places in Dublin and Ireland and further afield. Our motivation is to provide excellent and exciting cultural services in Dublin for public and civic benefit'</i></p>	<p>Northern Quarter Regeneration Strategy sets out a clear Vision for the area <i>'to build on its creative base and proximity to the main commercial core to assist its development as an attractive mixed use area'</i></p> <p>CityCo, Manchester's city management company is an independent, not-for-profit, membership organisation that brings together public and private sector businesses and partners.</p> <p>Their vision is: <i>'to make Manchester city centre a more dynamic, exciting and interesting place; to ensure continuing economic prosperity, and to continue to strengthen the brand and reputation of the city'</i></p> <p>One of their key aims is the development and promotion of Piccadilly. To address the area's needs, CityCo manages the Piccadilly Partnership; a strategic group that drives forward initiatives and events to enhance the area.</p>	<p><i>"Belfast's historic Cathedral Quarter is a focal point and leading destination for culture, enterprise and learning"</i></p> <p>The Cathedral Quarter Trust has four key priorities:</p> <ul style="list-style-type: none"> • To support the Cathedral Quarter as a centre for the arts and creative industries. • To support the growth of the mixed-use economy in the Cathedral Quarter. • To generate high levels of public participation. • To build and maintain a supportive infrastructure.
Visitors		
<p>Data from Failte Ireland Tourism to Dublin:</p>	<ul style="list-style-type: none"> • 'Marketing Manchester' states tourism adds £5.4bn a year to Greater Manchester's economy and 	<ul style="list-style-type: none"> • In 2009 there were 9.3 million visitors to Belfast with £451 million spend. This was an increase in

Temple Bar - Dublin	Northern Quarter - Manchester	Cathedral Quarter – Belfast
<ul style="list-style-type: none"> • Number of Tourist Visits 2010 to Dublin: • Britain 1,264,000 • Mainland Europe 1,355,000 • North America 608,000 • Other 257,000 <p>Tourism Revenue for the above:</p> <ul style="list-style-type: none"> • Britain 253 million • Mainland Europe 448 million • North America 198 million • Other 137 million 	<p>employs 75,000 people in 2009.</p> <ul style="list-style-type: none"> • 8.2 million staying visitors in 2009 • 89.7million day visitors in 2009 • 40,030 Bed stock in 2009 	<p>visitors of 32% from the previous year and an increased spend of 3.4%.</p> <ul style="list-style-type: none"> • Out-of-state visitors represented 31% of visitor trips to Belfast and they contributed around 75% of overall net income in 2008 • 2009 there were 9.3 million visitors with £451 million spend. This was an increase in visitors of 32% from the previous year and an increased spend of 3.4%; • Out-of-state visitors represented 31% of visitor trips to Belfast and they contributed around 75% of overall net income in 2008
Promotion and Awareness and News		
<ul style="list-style-type: none"> • Temple Bar Cultural Trust is an independent body. The main shareholder is Dublin City Council. It evolved from Temple Bar Properties, founded during the regeneration of the Temple Bar area of Dublin in the early 1990s. The Trust manages Rents in the area and organises cultural activities. • The Trust has been involved in a number of high-profile rent disputes in 2011. The manager of music venue the Button Factory, which entered examinership in February 2011, cited excessive rents as one of the reasons behind the venue's financial troubles. • A Report commissioned by Temple Bar Traders in 2011 which was undertaken by a former board member of the Arts Council, the National Gallery and former director of the Hunt Museum, compared Temple Bar with other areas of "cultural regeneration" in Europe, Australia, and the US. Among the report's recommendations are that Temple Bar should have: <ul style="list-style-type: none"> - a greater number of creative and visual artists working and living in the area; - that there should be more cultural activity in the evening; - and that the area should interact more with institutions such as Trinity College and City Hall. • The Temple Bar Trust disputed the findings of the Report finding them 'profoundly contradictory, weak and illogical' • McDonalds is trying to take over some space in Temple Bar and The Temple Bar Cultural Trust thinks that it is a terrible idea <p><i>'an example of global and modernised commercialism and Temple Bar is independent and full of small businesses'</i></p>	<ul style="list-style-type: none"> • Strategic Plan for Manchester City Centre 2009-2012 • Dedicated website • In order to manage resources to sustain the area's regeneration, Cityco has initiated the Northern Quarter Small Business Forum. • Judges for the Great Neighbourhood Award (organised by the Academy of Urbanism) awarded Manchester's Northern Quarter UK's best Neighbourhood Award 2011. Competition from other short listed nominees include: the Cathedral Quarter in Belfast and Pollokshields in Glasgow. Criteria used: <ul style="list-style-type: none"> - Governance - Local Character and Distinctiveness - User Friendliness - Commercial Success and Viability - Environmental and Social sustainability - Functionality • The Northern Quarter recently cited in national, and international headlines, as it provided the backdrop for key sequences in the Captain America motion picture. 	<p>The Cathedral Quarter Steering Group (CQSG). Established in 2008 and funded by the DSD and had input from Belfast City Council and Belfast City Centre Management. The group's remit was to develop a 5-Year strategic vision and development plan for the area</p> <ul style="list-style-type: none"> • There is a dedicated website for the Cathedral Quarter • The Cathedral Quarter is mentioned on a wide variety of associated websites including Discover Northern Ireland • Belfast hosted the EMA MTV Music Awards in 2011, which was a great success and showcased Belfast and areas such as the Cathedral Quarter.

Temple Bar - Dublin	Northern Quarter - Manchester	Cathedral Quarter – Belfast
Events and Festivals		
<ul style="list-style-type: none"> • There are more than 50 arts and cultural organisations based in Temple Bar, Dublin's Cultural Quarter, many of which are open throughout the year with free admission. These venues hold a wide range of film, art exhibitions and theatre events • Temple Bar Trade Fest – 200 free events, music trail, singers club, open sessions, two outdoor stages, the international Celtic Irish dance show, master classes and showcases, gigs for kids, children's club, pipe bands, street performers • Summer Sensational – July • Temple Bar Chocolate Festival • Temple Bar Circus Festival • Dublin Shakespeare Festival • Significant Pub scene 	<ul style="list-style-type: none"> • Piccadilly partnership and Cityco decide how to celebrate 2012 as the year of anniversaries – 20 years since the Northern Quarter was officially named • Annual Street Party, started on 29th April 2011 as an alternative to the Royal wedding celebrations • Hungry Pigeon: The Northern Quarter Entertainment & Arts Festival • Manchester Creative Business Forum - high-end networking event for business owners and directors within the city's Creative, Media, Digital and Broadcasting sectors • Annual Futuresonic festival • A vast array of DJs and bands are playing at various venues throughout the Northern Quarter 	<ul style="list-style-type: none"> • Belfast Nashville Songwriters Festival • Belfast Children's Festival • Belfast Children's Festival • Belfast Film Festival • Festival of Fools • Polish Cultural Week • Cathedral Quarter Arts Festival • Pop-Up pick 'n' Mix Festival • Open House Festival • Belfast Pride Festival • Belfast City Blues Festival • Culture Night Belfast • Art Gallery Tour • The Farset Way Walking Tour • Belfast Historic Pub Tours
Signage and Public Transport		
<ul style="list-style-type: none"> • All city centre buses will take you close to Temple Bar • The red line LUAS stops at Jervis Street, a 5 minute walk from Temple Bar • The nearest train and DART station to Temple Bar is Tara Street • You can avail of Dublin Bikes in Temple Bar 	<ul style="list-style-type: none"> • The Strategic Plan for Manchester City Centre 2009-2012 highlights the high number of buses using parts of the area which can act as a barrier to pedestrian movement • Metro link trams in the city • Buses • Taxis • Various car parks in the area 	<ul style="list-style-type: none"> • The Belfast Metropolitan transport plan and the Public Realm Master plan identify the opportunity to improve public transportation and discourage the use of private cars by creating a train station in the area • This leads to an area that is more attractive to pedestrians which leads to increased footfall in the area • Low impact forms of transport are being considered • Buses, taxis and car parks in the area
Commercial & Hospitality Sectors		
<p>Temple Bar area has</p> <ul style="list-style-type: none"> • Hotels • Pubs and Clubs • Restaurants • Theatres • Open Squares • Arts Centres • Stock Exchange • Central Bank • Cafes • Retail • Food Markets 	<p>The Northern Quarter is growing in the number of:</p> <ul style="list-style-type: none"> • Bars • Clubs • Restaurants • Residential Developments • Flower Markets • Fashion Markets • Retail • Cafes • Hotels 	<p>The Cathedral Quarter's mix of activities extends beyond cultural production and performance to include:</p> <ul style="list-style-type: none"> • Hospitality • Leisure • Offices • Housing • Retail • Restaurants • Cafes • Pubs and clubs <p>Three new hotels (i.e. The Merchant Hotel; Premier Inn; and Ramada Encore) form the basis of the daytime and evening economy.</p>
Future Investment		
<p>The Trust has just completed construction in September 2011 of a canopy in Meeting House Square, at a cost of approximately €2.4 million, which allow events to take place in the area year-round, such as the Temple Bar Food Market which moved back into the area at the start of December 2011. It has a built-in stage, a projection box, projectors and screen; it is in the middle of a cluster of restaurants (Eden, Pintxos and Il Baccaro), and is surrounded by</p>	<p>The longer-term regeneration of the area has been considered and a plan has been formulated for the regeneration strategy of Northern Quarter.</p> <p>The Strategic Plan for Manchester City Centre 2009-2012 key priorities for the Northern Quarter:</p> <ul style="list-style-type: none"> • The redevelopment of Church Street car park and the remodelling of Stevenson Square to encourage investment in the area 	<p>The Cathedral Quarter is the focal point for cultural activity in the city and as part of the continued regeneration of the area a number of on-going and projects are underway. These projects are intended to bring commercial growth to the city and the Cathedral Quarter. These include:</p> <ul style="list-style-type: none"> • The MAC Under construction <ul style="list-style-type: none"> - Due to open in 2012 - Includes two theatres - Three visual art galleries

Temple Bar - Dublin	Northern Quarter - Manchester	Cathedral Quarter – Belfast
<p>cultural buildings including The Ark, the Irish Film Institute, the National Photographic Archive and the Olympia Theatre.</p> <p>Chief executive of the Temple Bar Cultural Trust (TBCT) Dermot McLaughlin has revealed €12m plans (September 2011) which will “restructure the cobblestones” by 2016.</p>	<ul style="list-style-type: none"> • Improvements to key gateways and linkages • Tackling blight by prudently acquiring some of its more prominent causes • Regeneration of adjacent areas such as Ancoats Urban Village and Piccadilly Basin • Possibility of delivering the city-region’s offer to the media sector due to the area’s unique character • The development of Church Street car park • Remodelling of Stevenson Square • Northern Quarter Piccadilly Basin redevelopment area, a waterside mixed use development spanning 5.18 hectares (12.8 acres) 	<ul style="list-style-type: none"> - A dance studio - Education, workshop & rehearsal spaces - Office and Residency • The Royal Exchange Development <ul style="list-style-type: none"> - Due for completion in 2018 - 82,000m² covering 12 acres - 39,000m² of retail and leisure space - 8600m² of office space - 930m² for arts and cultural use - 240 apartments - 700 underground car park spaces • University of Ulster <ul style="list-style-type: none"> - Facilities for 12,000 students

BELMONT TOWER CASE STUDY



Contents

1	INTRODUCTION	1
2	BACKGROUND.....	2
3	ECONOMIC BENEFITS AND OPPORTUNITIES.....	4
4	SOCIAL BENEFITS.....	7
5	BENCHMARKING	8
6	CONCLUSIONS	9

1 Introduction

Belmont Tower is an award winning¹, Gothic styled, Victorian, B+ listed building situated at 82 Belmont Church Road, Belfast, close to Stormont Buildings and Belfast City Centre.

It is a few minutes from George Best City Airport and approximately 30 minute drive from Belfast International Airport. It is located near all major road, bus and sea networks.

Belmont Tower is managed by the Old Belmont School Preservation Trust (OBSPT). It is a single project Building Preservation Trust (est. 1999) with Charitable Status and a member of the Association of Preservation Trusts.

The Patron of the Trust is Lady Carswell OBE. There are currently six Trustees.

In 2001, the OBSPT acquired the building which was subsequently restored and opened in September 2004. The primary aims of the OBSPT are to²:

- Preserve, for the benefit of the public, a building of aesthetic, historic and architectural interest and importance;
- Ensure that the building is restored to the highest conservation standards;
- Retain the building as a focal point for the community, finding users which will be of benefit to them and appropriate given the location and history of the building; and
- Ensure that the project will be sustainable and economically viable in the long term.

Belmont Tower has experienced a 27% increase in usage in the last five years (see Table 2 below). However, the recent economic downturn has adversely impacted usage and repeat bookings, particularly from the corporate market.

This case study is designed to examine the issues surrounding Belmont Tower's current and future impact and sustainability.

¹ £1.2m restoration and extension to a grade B+ listed school building to provide new arts and conference facilities. Awards:

- Royal Institute of Chartered Surveyors (RICS) Award 2006 - Winner- Community Benefit category.
- RICS Award 2006 - Commendation, Conservation category
- RSUA Design Awards 2006 - Commendation, Conservation category.

² Financial Statements for the Year Ended 31st March 2011, submitted to the Companies House in December 2011 - Director's Report

2. Background

According to the Belmont Tower website it is 'A *unique venue in the heart of Belmont*'. Belmont Tower is a relatively small building which has been restored and extended to include a coffee shop and seven meeting rooms of different size and layout, which cater for groups up to 100 people.

The building serves the surrounding community to include: local residents, parents and young people from the seven local schools, and senior citizens from the local nursing home, all of whom use the facility for community meetings and activities (e.g. classes include: dance; yoga; singing; and art). Belmont Tower also caters for the corporate market that avails of the conference facilities, which has developed as a result of the building's close proximity to local businesses and the City Airport.

As the building has a close association with the author, CS (Clive Staples) Lewis, who wrote 'The Chronicles of Narnia'³, there is potential to generate further interest/usage from Tourism related activities. This is part of OBSPT's strategy of '*exploring other avenues for income generation and future use, such as cultural heritage*'⁴. The Director of OBSPT highlighted that the recent development of the CS Lewis exhibition in the Belmont Tower complements Belfast City Council's Literary Tourism Plan (2010 – 2014), which aims to develop a range of literary tourism products in Belfast.

Key milestones in Belmont Tower's evolution are summarised in Table 1, together with key dates from the life of CS Lewis. 2013 marks the 50th year anniversary of Lewis' death.

Table 1: Key Milestones in the life of Belmont Tower & CS Lewis

Years	Description	
1889	Ferguson Memorial School	In 1889, Mr Robert Ferguson made an initial donation of £1,000 to Belmont Presbyterian Church Committee. The building was designed by Mr Vincent Craig, brother of St James Craig (the first Prime Minister of Northern Ireland) and became known as the Ferguson Memorial School in 1890. In 2005 the Ferguson Memorial School was re-named as Belmont Tower.
1898	CS Lewis was born	CS (Clive Staples) Lewis was born in Ballyhackamore, in East Belfast on 29 th November 1898. The Lewis family lived at Dundela Villas, Belfast. The Villas were demolished in 1952, but a blue Ulster History Circle plaque marking the site can be seen on the more recent Dundela Flats, just off Dundela Avenue. 'Little Lea' on the Circular Road is, however, the house most associated with Lewis in Belfast. It was the family home from 1905, when Lewis was six, until 1930, although Lewis was educated at English public schools as a teenager, and lived only intermittently in Little Lea during that period. 'Little Lea' is situated only a short walk from the Ferguson Schools, now known as Belmont Tower. Lewis went to school in the nearby Campbell College.
1908	CS Lewis mother died	Lewis's mother died in 1908 and Jack and his brother, Warren, were sent to boarding school in England, Wynard School in Watford, outside London.
1910	Campbell College	The Wynard School closed in 1910 and CS Lewis returned to school in Campbell College, Belfast where he remained for a year before returning to England.

³ The Chronicles of Narnia is a series of seven high fantasy novels for children by CS Lewis to include: The Lion, the Witch and the Wardrobe; Prince Caspian; The Voyage of the Dawn Treader; The Silver Chair; The Horse and His Boy; The Magician's Nephew; and the Last Battle. It is considered a classic of children's literature and is the author's best-known work, having sold over 100 million copies in 47 languages.

⁴ Financial Statements for the Year Ended 31st March 2011, submitted to the Companies House in December 2011 – Plans for Future Years.

Years	Description	
1917	Oxford College	Lewis was injured in the Battle of Arras in 1917 (World War I) and so returned to study at University College, Oxford where he achieved a triple first. He went on to become a fellow at Magdalen College, where he tutored medieval and renaissance English Literature. Lewis was a committed Christian and his faith influenced much of his work.
1926	Belfast Corporation	Belmont Presbyterian Church managed the Ferguson Schools until 1926 when they were handed over to the Education Committee of the Belfast Corporation under the Education Act (NI) 1923.
1935	St Mark's Church	Lewis' and his brother Warren presented a window to St. Mark's Church (built 1878), Holywood Road, east Belfast in 1935 in memory of their parents. The church has produced a guide for visitors interested in objects associated with Lewis in the church. The 'lion' doorhandle of the Old Rectory, still in the church grounds, may have inspired the character of Aslan in the Narnia books.
1949	The Chronicles of Narnia	Lewis is best known for 'The Lion, the Witch and the Wardrobe' published in 1949. The success resulted in a further six titles which became known as the 'Chronicles of Narnia', which went on to sell 100 million copies worldwide.
1953	CS Lewis' wife	Lewis befriended and later married the American poet, Joy Davidman Gresham, who moved to England in 1953 after their separation. Joy died in 1960 from cancer.
1963	CS Lewis died	Following a short illness CS Lewis died on 22 nd November 1963 and was buried in the Holy Trinity Church in Oxford.
1975	Belfast Education & Library Board	The Ferguson school was leased and sold in 1975 to the Belfast Education & Library Board.
1994	Deterioration	In 1994 the condition of the school buildings had deteriorated to a degree which it was no longer economically viable and that a new school should be built on the grounds.
1999	Schools Closed	The building was declared 'surplus to requirements' in May 1999 and the school subsequently closed.
1999	Old Belmont School Preservation Trust	In June 1999 a group of concerned local residents came together to try to save the building and in November 1999 the Old Belmont School Preservation Trust (OBSPT) was formed.
2001	OBSPT acquires Belmont School	The OBSPT acquired the building in April 2001 with a £300,000 thirty year loan from the Ulster Garden Villages and by also signing a 99 year lease with Belfast City Council.
2004	Belmont School official opened	Restoration work was completed in April 2004 and the building was officially opened by HRH Prince Charles on 1 st September 2004.
2005	Belmont Tower	The Building was renamed Belmont Tower in April 2005 and is now a venue for meetings, events, exhibitions for business, arts and community organisations. Belmont Tower's Patron is Lady Carswell OBE.
2006	Award winning Belmont Tower	Royal Institute of Chartered Surveyors (RICS) award 2006 – Winner-Community Benefit category. RICS award 2006 – Commendation, Conservation category RSUA Design Awards 2006 – Commendation, Conservation category.
2010	Freehold interest in Belmont Tower	The OBSPT approached the Belfast City Council in order to purchase a freehold of the site. In order for this to happen the lease from the Belfast Education and Library Board to the Council and the lease from the Council to the Trust need to be extinguished. The council recommended that they agree to the extinguishment of the leasehold interests as described.

Years	Description	
2011	CS Lewis Tour opens in Belmont Tower	A permanent exhibition celebrating the life and works of CS Lewis was opened in the Belmont Tower in late 2011. There is also a short course on the Life and work of CS Lewis by Sandy Smith (expert on CS Lewis, having led tours around Belfast for a number of years) to be held in January and February 2012.
2012	100 th Anniversary	2012 marks the 100 th year anniversary of the sinking of the Titanic. Lewis came from a family where shipbuilding was a feature. His grandfather was a shipbuilder and marine engineer, the family home 'Little Lea' overlooks both Belfast Lough and the shipyards. Lewis would often refer to 'continual throb and stammer of the great shipyards' in his writings.
2013	50 th Anniversary	CS Lewis died in 1963 and 2013 marks the 50 th year anniversary of his death.

Tourists can avail of a CS Lewis tour '**In the In the footsteps of Lewis**', which operates annually from June to September. The tour involves visiting the key sites outlined in the table above, to include Belmont Tower. The tour commences at the Linen Hall Library, Belfast's oldest library, which is home to a unique collection of books by and about CS Lewis donated by the CS Lewis Association of Ireland.

3. Economic Benefits and Opportunities

The foundation blocks to the Trust's business plan are corporate and community bookings, events and the coffee shop - the trading arm of the Trust, from which revenue is generated. Using figures from the coffee shop, visitor's book in the CS Lewis Exhibition and room hire booking forms the Belmont Tower annual footfall is approximately **60,000 visitors**.

Employment

In terms of employment, the overall complement of paid staff includes: one full time member of office staff and three part-time caretaking staff. Further unpaid support is provided by the Trustees and up to 30 volunteers, who assist with events throughout the year.

Occupancy Rate & Bookings

Overall Room Hire Occupancy

There are seven meeting rooms of different size and layout, which cater for groups up to 100 people. These rooms are hired by a wide range of customers from the community, the business sector and the statutory sector. Activities include: community group meetings; wide-ranging classes to include dance; yoga; singing; and art; conferences; seminars etc.

The overall occupancy rate in 2011 was recorded as 45.18%, representing a 2.9% decrease from the previous year (NB. 2010: 48.03% and 2009: 49.3%). The sessional occupancy rate dropped to 16.58% (NB. 2010: 25.28%, 2009: 26.52%)⁵.

Bookings

Belmont Tower has experienced a 27% increase in usage in the last five years (Table 2). Marketing is carried out on a volunteer base by the six Trustees, to include cold calling local business to generate interest in the use of the conference facilities. "*We have achieved a lot considering that we do not have a marketing budget*".

⁵ Financial Statements for the Year Ended 31st March 2011, submitted to the Companies House in December 2011 - Director's Report.

OBSPT have been innovative in their approach to marketing, to include the erection of a temporary art sculpture of a 'Lion' for the launch of the CS Lewis Exhibition, depicting the character in CS Lewis' books, to attract attention from local residents and passing motorists. According to the Director of the Trust, the sculpture had a "hugely positive impact in terms of interest generated".

Although the overall number of users of the building has remained stable in the last three years (102 to 108 users); the number of corporate users has decreased by 25% in 2010-11, as highlighted in the Table 2 below.

As a result of this decrease, coupled with a decrease in the number of repeat bookings (Table 3), OBSPT's income has deteriorated.



Temporary Artwork outside Belmont Tower

Table 2: Number and % of Users of the Building

	2010-11		2009-10		2008-09		2007-08		2006-07	
Community	63	62%	54	51%	53	49%	63	72%	43	58%
Corporate	39	38%	52	49%	55	51%	25	28%	31	42%
Total	102		106		108		88		74	

In terms of regular/repeat bookings, the trend for community bookings has increased steadily, however corporate repeat bookings have decreased by 65% in the same period.

Table 3: Number and % of Regular / Repeat Bookings

	2010-11		2009-10		2008-09		2007-08		2006-07	
Community	35	80%	32	65%	31	54%	24	67%	15	54%
Corporate	9	20%	17	35%	26	46%	12	33%	13	47%
Total	44		49		57		36		28	

Due to the decrease in corporate bookings the Directors of the Trust are exploring other avenues for income generation and future use such as cultural heritage. In 2011 the Trust has:

- Developed a CS Lewis exhibition, funded by Belfast City Council as part of the Belfast Literary Festival;
- Organised a fundraising dinner in Belfast City Hall in December 2011 (approximately £6K raised for the building);
- Continued CS Lewis tour, 'In the In the footsteps of Lewis';
- Launched CS Lewis Lectures at Belmont Tower - available from 31st January 2012 until 28th February 2012 to include the following topics: Beginnings in Belfast; Roots in Belfast Garden; Events in Oxford; Overview of his work; and Themes in Lewis. Attendance on the 5 week course costs £50.

It was acknowledged by the Director of OBSPT, that despite the 'economic downturn' the Trust are working to reduce their administration debt and are currently breaking even in these 'challenging times'. Generally "people do not realise that the Trust is made up of volunteers and that all donations and profits are reinvested into maintenance of building and development of revenue generating activities".

OBSPT – Objectives for Sustainability⁶

In order to be financially sustainable in the long term, OBSPT must satisfy the following key requirements:

- Sufficient income must be generated to cover the on-going maintenance of the building;
- Sufficient income must be generated to repay the acquisition loan from Ulster Garden Villages Limited as required;
- Tenants should be financially sound, stable and should provide appropriate activities which meet the needs of the community and benefit a wide range of people; and
- The building must remain adaptable enough to cope with changes in the demand for activities.

The Trust met the requirements in the year to 31st March 2011:

- The costs of the preservation and cost of upkeep of the building were met during the year although the margin has narrowed since 2010;
- The loan to Ulster Garden Villages was repaid in full with a grant from the Northern Ireland Environment Agency and Ulster Garden Villages;
- The Trust participated in heritage open days, exhibitions of the history of the building, table quizzes and craft fairs. These activities earned income for the Trust and benefited the local community; and
- The Trust is seeking a freehold interest in the building, releasing them from leasehold restrictions and helping them to remain adaptable.

Future Opportunities for Growth

The UK currently features No.1 in a list of top ten literary destinations of the world.⁷ Literary Tourism contributes £2.6billion a year to the economy.⁸

Consequently, Belfast City Council recognised that there is substantial potential for the development of Literary Tourism in Belfast. In June 2009, approval was given by Belfast City Council Development Committee to develop Literary Tourism in Belfast. The 'Cultural Tourism - Developing Belfast's Opportunity' strategy detailed the aim of supporting and developing cultural tourism as well as making culture and heritage more accessible to visitors.

Belfast City Council's Literary Tourism Plan is currently in place and the following new products have been completed:

- Belfast Through Writers' Eyes. This includes a new Literary Belfast iPhone app;
- Promotion of Literary Events and Establishing Networks. This includes the Cathedral Quarter's Arts Festival, CS Lewis and Literary Societies and Belmont Tower;
- A **revamped CS Lewis exhibition** at both the Belmont Tower and the Linenhall Library;
- The Belfast's Poets and Writers Exhibition and BBC Literary Archive;
- A new website, www.LiteraryBelfast.org; and
- Annual Belfast Book Festival.

Belfast City Council's recent strategy 'Belfast Tourism Gateway to the Future (2010-2014)', has identified Literary Tourism a priority area, in order to develop the 'Belfast Experience'.

⁶ Financial Statements for the Year Ended 31st March 2011, submitted to the Companies House in December 2011 - Director's Report

⁷ Trip Advisor – Top Ten Literary Destinations

⁸ Belfast City Council Development Committee Chairman June 2011

Belmont Tower's close connection with CS Lewis gives it a great opportunity to be part of the Literary Tourism of Belfast. Indeed the OBSPT are exploring a range of marketing opportunities and future Literacy Tourism products to generate interest/usage. For example:

- OBSPT are currently working with 'Creative Exchange Artist Studios' drafting drawings for the development of a permanent 'lion' statue/sculpture outside the building to attract visitors, to be ready in time for the 50th anniversary of CS Lewis' death i.e. 29th November 2013. In the meantime, the Trust are planning a series of projects with local schools to draw images of CS Lewis work based on the Lion, the Witch and the Wardrobe which will be displayed in the building. It is envisaged that the first school display will be in place for Easter (April 2012);
- An application to the BCC is currently being prepared to acquire funding for further CS Lewis workshops/lectures during the summer;
- Trustees are currently working with the Ullans Academy and Culturlan for a series of lectures to start in May 2012 and will run for 20 weeks. Culturlan and Belmont Tower will be the locations for bringing groups together to discuss shared culture;
- Trustees are liaising with business throughout Belfast and linking with networks in America to promote the conference and meeting facilities in Belmont Tower as well as the new CS Lewis exhibition;
- Trustees and past pupils of Belmont Tower, Lord Browne and Cedric Wilson, are currently establishing a 'Friends of Belmont' membership, which will help to **generate donations** to maintain/support Belmont Tower. The details regarding membership benefits are currently being explored by the Trust. It is envisaged that initial interest will be gained from well-known past pupils of Belmont Tower (e.g. Ivan Little; Noel Thompson; Julian Simmons; Col Tim Collins; and Nathan Connelly). 'Friends of Belmont' will be encouraged to: Make a donation (e.g. one-off donation, annual donation); Book facility for an event or meeting; Visit the coffee shop; support events; donate second hand books; volunteer to help with the CS Lewis Exhibition; and
- Belfast Bus Tours do not include a stop at Belmont Towers, it is hoped that discussions with tour operators and the further development of the CS Lewis exhibition space will result in increased footfall being generated by such tours.

The Trust's Business Plan for 2012-2015 highlights the intention of the Trustees to change the focus of the facility from multi-purpose use towards a focus on arts, cultural, and heritage themed projects and social programmes as it is considered these offer greatest growth potential. It is also considered that this change of emphasis, will help to distinguish Belmont Tower from other conference facilities in east Belfast, and will also serve to give the building a more defined and recognisable role and identity.

Please refer to **Annex I**, which summaries the key priorities for future development, as outlined in the Trust's Business Plan 2012-2015.

4. Social Benefits

Investment and promotion of Belmont Tower will contribute towards achieving the following social benefits.

- **Celebrating Culture & Heritage**

Maintaining a recently restored historic building has the potential to increase the public's appreciation of the City's history. Of particular interest is Belmont Tower's connection with CS Lewis, contributing to the promotion of Northern Ireland's literacy legacy. This can play an important part in educating communities and school children about literary heritage.



CS Lewis Statue – based on famous Chronicles of Narnia (situated outside Holwood Arches Library, East Belfast)

The OBSPT have actively promoted literary heritage, which according to NITB *'forms a key part of our unique culture'*⁹. This promotion has included participation in the European Heritage Open Days which involved exhibitions of the history of the building and its former pupils as well as representation from the East Belfast Historical Society and the North of Ireland Family History Society.

By protecting this historic site will ensure that these assets will be maintained for future generations to appreciate.

- **Increasing Civic Pride & Well-being**

Belmont Tower serves as a focal point for community and cultural activity and is described as *'A unique venue in the heart of Belmont'*. It has created opportunities for social interaction and brings together a wide-range of individuals for personal and business purposes. This is in keeping with one of the primary aims of the OBSPT, which is *"To retain the building as a focal point for the community, finding users which will be of benefit to them and appropriate given the location and history of the building"*.

According to OBSPT, Craft Fairs and Farmers' Markets are held throughout the year, not only contribute to the income of the Trust but also to serve the local and wider community, support small local crafters and traders, raise the profile of the building and increase footfall in the Belmont area.

In 2006, Belmont Tower won the Royal Institute of Chartered Surveyors (RICS) Award 2006 for the Community Benefit category. This award recognises outstanding achievements in providing a facility which directly benefits the local community, which has demonstrated its success through local community feedback.

- **Developing skills and volunteering opportunities to preserve the historic environment**

Belmont Tower has encouraged communities and local groups to use the building for events, activities, meetings etc. OBSPT have also created opportunities for up to 30 volunteers in the local areas to support various events throughout the year. Volunteering provides an opportunity to up-skill and increase the capacity of individuals' which will contribute to enhanced personal well-being and transferable skills for future employment.

5. Benchmarking

The Belmont Tower is a similar model to that of the Crescent Arts Centre, which also began life as a school i.e. the Ladies' Collegiate School, later renamed as Victoria College. The Crescent Arts Centre is located at 2-4 University Road, Belfast and is a B+ listed building offering the community access to wide-ranging cultural activities. As with the Belmont Tower, The Crescent Arts Centre is a company limited by guarantee and is a registered charity.

In May 2010, the Crescent re-opened following an 18 month, £7.2m refurbishment and extension programme. Activities currently offered in the Crescent Arts Centre include: visual arts, many forms of dance and movement, verbal arts, music in many forms, theatre and drama activities, crafts, and an extensive programme of activities and workshops for young people. The Crescent also hosts an annual 'Between the Lines Literary Festival', which involves literary readings from local authors. It would be beneficial for Belmont Tower to link with such an event to capitalise on their CS Lewis connection.

The OBSPT may also benefit from liaising with the Crescent to discuss the range of activities offered and key lessons in terms of implementation and operating on a larger scale than that of Belmont

⁹ NITB's Director of Product Development, The Guardian Friday 26th August 2011 'Gala celebration of Belfast Literature'

Tower, to aid future growth aspirations. It is important to note that although income from rents and workshops is higher in the Crescent than Belmont Tower due to the difference in scale of venue, their margins and reserves are no better, based on a review of financial statements. The difficult economic climate is the same for all organisations, regardless of size.

6. Conclusions

As outlined in Section 1, the primary aims of the OBSPT are:

1. To preserve, for the benefit of the public, a building of aesthetic, historic and architectural interest and importance;
2. To ensure that the building is restored to the highest conservation standards;
3. To retain the building as a focal point for the community, finding users which will be of benefit to them and appropriate given the location and history of the building; and
4. To ensure that the project will be sustainable and economically viable in the long term.

Belmont Tower has benefited from a £1.2m restoration and extension to provide new arts and conference facilities, therefore meeting aim 1 and 2 above. In terms of the third aim, this can also be regarded as being met, as Belmont Tower is known locally as the '*hub of the community*' and '*A unique venue in the heart of Belmont*'. In 2006, Belmont Tower won the Royal Institute of Chartered Surveyors (RICS) Award 2006 for the Community Benefit category, as a further testament to this historic asset providing a focal point for the community.

The fourth and final aim is the most challenging. Due to the uncertainty of the economic outlook, it is difficult to assess whether the project will be sustainable and economically viable in the long term. However, the OBSPT have demonstrated their ability to meet requirements outlined in their financial statements, to include generating sufficient income to cover maintenance costs and loans.

Furthermore, the OBSPT have demonstrated their proactive approach to seeking other avenues for income generation and future use to alleviate concerns regarding decreasing usage/bookings. Of particular note is the development of the CS Lewis exhibition, which was launched in 2011 and through this strong connection to such a famous author Belmont Tower is well placed to take advantage of the 'Literary Tourism' surge, as identified by Belfast City Council as a key priority area. 2013 represents the 50th anniversary of CS Lewis' death, therefore offering further opportunities to promote Belmont Tower and enhance its reputation as a place to celebrate Literary Culture.

CS Lewis also has a connection with the Titanic and therefore an impending opportunity presents itself in 2012 with the 100 year anniversary of the sinking of the famous ship to increase tourist footfall to Belmont Tower. Belmont's close proximity to the docks and the shipyard as well as to the local airports leaves it very well placed to take advantage of the significant interest in the Titanic story. The nearby development of the Titanic Quarter further enhances future potential.

Annex I: Outline of a future Development Plan for Old Belmont School Preservation Trust

The following paragraphs are extracts from OBSPT's Future Development Plan 2012-2015.

A new vision:

Belmont Tower has previously been marketed as a multi-purpose facility, the trustees consider that, in terms of the future, the building should instead be promoted as an arts, cultural and heritage centre. It is envisaged that room letting for corporate and community use will continue to make a significant contribution to the trust's income; however, under the trust's new business plan, the emphasis will move increasingly towards the arts, cultural, and heritage themed projects and social programmes as it is considered these offer greatest growth potential. It is also considered that this change of emphasis, will help to distinguish Belmont Tower from other conference facilities in east Belfast, and will also serve to give the building a more defined and recognisable role and identity.

Development Plans & Priorities:

The list below is based on consideration and analysis of each aspect of the trust's vision for the future development of the building as an arts, cultural and heritage centre. It is anticipated that existing activities under the various headings will continue over the term of the development plan and so the items listed should be regarded as additional.

The actual timing of execution of the individual projects and programmes will be entirely reliant on funding being available. As the trust's own budget is likely to remain under considerable pressure in the foreseeable future, much will depend on the availability of grant assistance.

It is important to note that the below items remain to be costed.

External improvements and marketing:

1. Revise and up-date all promotional, marketing and website material on Belmont Tower.
2. Develop and roll out a new marketing plan, presenting the building as an arts, cultural and heritage centre
3. Replace and up-grade external signage to reflect building's new role as an arts, cultural and heritage centre.
4. Provide complementary tourism signage.
5. Provide a model of Aslam, the lion, as an attraction for those visiting the Lewis exhibition in the building.
6. Increase car parking provision.

The heritage dimension:

1. Re-brand the building internally through the addition of large scale display boards showing photographs of the restoration, other local heritage material, notable east Belfast sights and people.
2. To coincide with forthcoming anniversaries, organise specific exhibitions on the Plantation of Ulster, the Solemn League and Covenant, and Ulster's part in the First World War.
3. Organise a complementary programme of lectures for the local community and schools on each of the above topics.
4. Continue to mark the European Heritage open day.

Arts and cultural dimension:

1. Further develop the Lewis exhibition through the acquisition of books, additional artefacts and display materials, the creation of a small library and suitably furnished reading area.
2. Organise and deliver a programme of talks on Lewis and the Chronicles of Narnia for the benefit of the local community, schools and visitors.
3. Facilitate the development of a summer school for overseas students of Lewis.
4. Develop a trail map of buildings with a connection with Lewis in the area.
5. Explore further the opportunity to stage a short drama production on Lewis
6. Facilitate the staging of art and craft exhibitions

Tourism:

1. Provide a reception desk and tourist information point within the lobby area, suitably equipped with literature.
2. In partnership with the Belfast Visitor and Convention Bureau, encourage the city tour bus companies to include Belmont Tower in their list of pick-up and drop-off service points.
3. Develop a small retail outlet for visitors with local quality goods and mementoes.

Social and seasonal events:

1. Develop and roll-out a programme of special family based seasonal events around the main calendar dates for Easter, Halloween, and Christmas.
2. Facilitate the establishment of a young mothers 'drop-in group.'



northernireland
tourist board



Department for
Social
Development

www.dsdni.gov.uk



National
Trust

eftec
economics for the environment

RSM! McClure Watters
Audit · Tax · Consulting