

# Valuing the Welsh Historic Environment



Commissioned by:



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**Images:**

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# Background to the Study

## Impetus for the Study

The Valuing our Environment Partnership works together to reveal hard economic evidence that the environment is fundamental to prosperity in Wales. Its work over the past 10 years has been led by the National Trust Wales, with core partners: the Countryside Council for Wales, the Environment Agency, the Heritage Lottery Fund, and the Welsh Assembly Government - specifically Visit Wales and the Department for the Economy and Transport.

The Heritage Minister's Historic Environment Group, which was established to advise the Welsh Assembly Government on action to benefit and promote the historic environment, identified that Wales lacked up-to-date evidence that fully captured its economic, social and environmental benefits. In addition, it lacked a consistent methodology for ongoing data capture. The Valuing our Environment Partnership agreed to lead on this research via a special working group led by the National Trust comprising: the Welsh Assembly Government (Cadw, Visit Wales and the Department for the Economy and Transport), Countryside Council for Wales, the National Park Authorities for the Brecon Beacons, Pembrokeshire Coast and Snowdonia, and the Heritage Lottery Fund (HLF).

It can be argued with some conviction that a lack of appreciation of the socio-economic and environmental benefits of heritage has led to under-funding of the historical environment. Identifying and more accurately quantifying the value of the sector to Wales is a critical step towards acceptance of the need for regular investment if heritage assets are to not deteriorate.

## The Research

In February 2010, ECOTEC Research and Consulting Ltd was commissioned by the Valuing our Environment Partnership to undertake research to assess the value of the Welsh historic environment sector, both in strict economic terms but also in terms of its wider social value.

The research comprised the following key components:

- A review of secondary data and documents.
- Consultations with 38 individuals from 24 organisations operating in the historic environment sector.
- An economic assessment of the contribution of the historic environment sector to the Welsh economy.
- The development of nine case studies that demonstrate the qualitative value of the Welsh historic environment, which included a further 11 consultations.
- The development of a monitoring framework that proposes a consistent methodology for ongoing data capture by partners in the sector.

This research has produced the following reports:

- This report - Valuing the Welsh Historic Environment
- Valuing the Welsh Historic Environment: Summary
- Valuing the Welsh Historic Environment: Economic Impact Technical Report (pdf)
- Valuing the Welsh Historic Environment: A Monitoring Framework (pdf)

Overall, the study helps to make the case for investment in the Welsh historic environment by demonstrating the public value of heritage assets across Wales and the need for adequate protection, investment and access provision.



## Defining the Welsh Historic Environment

There is no universally recognised definition of the historic environment sector. For the purpose of assessing economic contribution, the historic environment sector 'inner cog' comprises those organisations that can be considered to be at the core of the historic environment sector, as defined below:

### Defining the historic environment sector 'inner cog'

Organisations that are active in conserving, maintaining and managing and/or creating access to Wales' historic environment. In particular, this research focuses on the following assets:

- Scheduled ancient monuments / archaeological sites
- Listed buildings
- Conservation areas
- Registered historic gardens/ designed landscapes
- Registered historic landscapes
- Marine historic landscapes
- Museums / heritage centres, where they are located within a historic building/ asset

## The Scale of the Welsh Historic Environment

The historic environment sector in Wales comprises a range of organisations whose primary remit is the conservation, maintenance or management of the historic environment. What is more, these organisations cut across the public (e.g. Cadw), private (e.g. architects specialising in historic buildings) and voluntary sectors (e.g. building preservation trusts). However, it is also important to recognise that for many organisations, although the historic environment may not be their primary focus, it is an integral, but sometimes implicit, part of their work, for example, for the Economy and Transport Department of the Welsh Assembly Government and Visit Wales.

# Background to the Study (cont'd)

The following table provides some indication of the scale of the Welsh historic environment. In addition to these assets, there are also a range of non-registered / non-designated historic assets that are of great local importance.

Type	Number
World Heritage Sites	3
Listed buildings	29,889
Scheduled ancient monuments	4,111
Designated historic wrecks	6
Registered historic landscapes, parks and gardens	428
Conservation areas	519

*Source: The Welsh Historic Environment: A Strategic Statement, 2009;  
The Welsh Historic Environment Position Statement, 2008.*

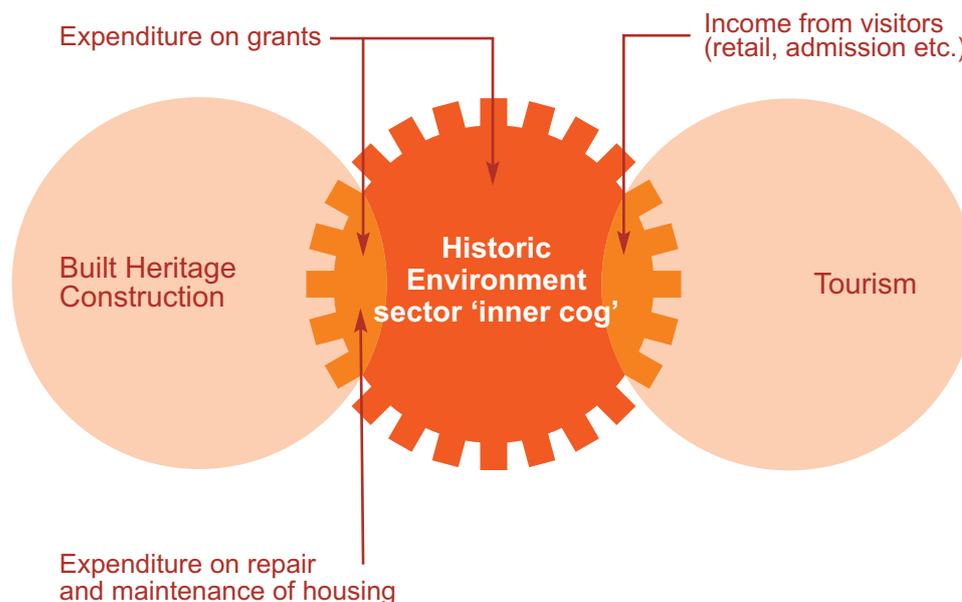


# Economic Value of the Welsh Historic Environment

## Assessing the Economic Value of the Welsh Historic Environment

The assessment of the economic value of the Welsh historic environment brings together and synthesises the results of primary and secondary research in order to examine the contribution of the historic environment sector to the Welsh economy. The evidence and analysis relates to economic activity attributable, in turn, to those organisations comprising the 'inner cog' of the historic environment sector, the built heritage construction sector, together with expenditure resulting from tourists attracted to Wales principally because of the historic environment. For each of these 'pillars', it considers the direct<sup>1</sup> contribution as well as the indirect<sup>2</sup> and induced<sup>3</sup> contributions of the historic environment sector.

The 'inner cog' of the historic environment sector has been defined for the purpose of the study to comprise those organisations that can be considered to be at the core of the historic environment sector (i.e. activities concerned with the protection, enhancement and conservation of the historic environment sector): (1) large employers and grant bodies, such as Cadw, the National Trust, Countryside Council for Wales and the HLF, (2) smaller organisations, such as trusts and societies, all of whose principal *raison d'être* is the preservation and conservation of the historic environment, (3) relevant sections of the Welsh Assembly Government and local authorities, and (4) organisations providing specialist archaeological and architectural services.



### Footnotes:

- 1 The direct contribution includes direct employment, expenditure and output by organisations in the 'inner cog' of the historic environment sector, built heritage construction output, and expenditure by tourists who have been attracted to Wales primarily because of its historic environment.
- 2 The indirect contribution includes purchases of inputs made by firms that are supplying goods and services to the 'inner wheel' of the historic environment sector, the built heritage construction sector and organisations associated with tourism, including hotels and restaurants.
- 3 The induced contribution comprises benefits to the Welsh economy as a result of increased income and spending by people who work in the 'inner wheel' of the historic environment sector, the built heritage construction sector, and tourism sector, and in those businesses that supply goods and services to these sectors.



### Total Economic Contribution

Taking into account the economic contribution of those organisations comprising the 'inner cog' of the historic environment sector, the built heritage construction sector, together with expenditure resulting from tourists attracted to Wales principally because of the historic environment, the aggregate economic contribution of Wales' historic environment sector is summarised in the following table.

It is important to note that the results should be interpreted as very conservative, principally due to the following:

- The research adopted a relatively narrow definition of the historic environment, which ensured that the approach was transparent and robust. However, as a result, it is likely to under-estimate the true value of the sector.
- In addition to using secondary data, the research also analysed primary data that was collected from organisations operating in the historic environment sector. However, information gathering and recording processes vary across organisations and consequently, some were unable to provide a breakdown of their output and expenditure specific to the historic environment. To help address this issue in the future, ECOTEC has proposed a consistent monitoring framework to support organisations in capturing the ongoing value of the Welsh historic environment.

### Historic environment sector: Total economic contribution<sup>4</sup>

	Direct	Indirect and Induced	Total
Output <sup>5</sup> (£m)	£1,055.0	£951.0	£1,837.1
Employment <sup>6</sup> (FTE)	19,317	13,176	30,453
GVA <sup>7</sup> (£m)	£497.1	£406.6	£839.4

*Source: ECOTEC analysis; the value of output and GVA has been adjusted for inflation. Headline figures are presented in 2009 prices. The sum may not add up to the total due to rounding.*

#### Footnotes:

- <sup>4</sup> It is important to note that the individual contributions from all three aspects of the historic environment do not readily sum to represent the total economic impact of the historic environment, on account of overlaps and inter-dependencies occurring within the sector.
- <sup>5</sup> Output (turnover) is the total value of all the goods and services produced in an economy.
- <sup>6</sup> Employment (full time equivalents (FTEs)) measures the extent to which a worker is involved in the historic environment. A full time equivalent of 1.0 means that the person's involvement in the historic environment is equivalent to a full-time worker. If an employee dedicated 18.5 hours per week on the historic environment this would represent 0.5 full time equivalent employees, based on a 37 hour week ( $18.5/37 = 0.5$ ).
- <sup>7</sup> Gross value added (GVA) is the difference between output and intermediate consumption for any given sector/ industry. That is the difference between the value of goods and services produced and the cost of raw materials and other inputs which are used up in production.

# Economic Value of the Welsh Historic Environment (cont'd)

The key findings to emerge from the economic assessment are outlined below:

- The historic environment is a highly significant contributor to the Welsh economy, directly supporting more than 19,000 FTE jobs.
- Including indirect and induced effects, it is estimated that the historic environment sector supports over 30,000 FTE jobs in Wales.
- Overall, the historic environment sector is estimated to contribute approximately £840 million to Wales' national Gross Value Added (GVA), which is equivalent to 1.9% of Welsh GVA.
- The historic environment also contributes some £1.8 billion in respect of output.
- The inner cog of the historic environment sector supports over 2,100 FTE jobs in Wales, which is estimated to contribute some £80 million to Wales' national GVA, with approaching £140 million in respect of output.
- A considerable share of economic impacts relate to tourism expenditure attributable to the historic environment. The research states that one-fifth (20%) of total tourism expenditure represents a reasonable, if perhaps conservative, estimate of the importance of the historic environment sector in attracting visitors to Wales.
- Tourism expenditure is estimated to support some 14,900 FTE jobs in Wales, with this representing some £330 million in respect of GVA and more than £610 million in respect of output.
- The built heritage construction sector also accounts for a substantial share of the total economic impact. Notably, a significant proportion of this overall impact is as a result of grants and / or expenditure by core historic environment organisations, including Cadw and the National Trust, for example to conserve or repair historic assets in their guardianship.
- Including work funded by grants and expenditure by core historic environment organisations, the built heritage construction sector supports over 13,400 FTE jobs in Wales, and generates approximately £450 million in respect of GVA and £1.1 billion in output.



# Wider Value of the Welsh Historic Environment

## Capturing the Wider Value of the Welsh Historic Environment

The previous chapter highlights that the Welsh historic environment plays a clear role in contributing to the Welsh economy. However, when its wider public value is also considered, the overall value of the Welsh historic environment is actually far greater. In line with the Welsh Assembly Government, it is an asset that contributes to all aspects of the sustainable development principles, as defined below<sup>8</sup>.

*“Sustainable development means enhancing the economic, social and environmental wellbeing of people and communities, achieving a better quality of life for our own and future generations.”*

This chapter summarises the wider value of the Welsh historic environment. The information has been gathered from consultations that were conducted with individuals operating in the historic environment, plus nine case studies which are set out later in this report.

## Economic Value

**Supporting wider regeneration activities:** The historic environment can make an important contribution to the regeneration of both urban and rural areas, as demonstrated through the case study of the Blaenavon World Heritage Site. Regeneration opportunities are often centred on iconic landmark buildings and their re-use and integration is fundamental to the success of wider regeneration activities. Through the adaptation of historic buildings for modern uses, and in providing a high quality setting for new development, the historic environment provides a unique environment where people choose to live and work. What is more, their inherent quality also provides an opportunity for reviving run-down areas. In recognition of this, one of the three thematic foci that have been identified by the Regeneration Department at the Welsh Assembly Government is heritage.

Wrexham County Borough Museum, which is located in an important listed building, is being redeveloped as a major attraction for North Wales. The Museum will provide a focal point for the town centre and is therefore a key part of a much wider regeneration programme.

**Enhancing skills for jobs:** The historic environment sector can contribute to equipping young people and adults alike with the skills they need to fulfil their potential at work. In addition, it can contribute to the priorities outlined in 'Capturing the Potential: A Green Jobs Strategy for Wales', which aims to stimulate new green jobs by developing skills. As an example, the National Trust offers adults the opportunity to gain recognised vocational qualifications through its Careerships programme and in turn, this learning can improve peoples' attainment and employability. Similarly, Cadw promotes the development of traditional skills through the use of apprentices. Further education colleges and universities also have a key role to play in raising the skills levels within the historic environment sector.

Every year, Davies Sutton Architects, which specialise in the care and conservation of historic buildings, offers a student from the Welsh School of Architecture at Cardiff University, a year-long placement at their business.

## Footnotes:

<sup>8</sup> One Wales: One Planet, 2009, Welsh Assembly Government



**Catalysing investment:** The historic environment can act as a stimulus for further investment. There are numerous examples of restored historic buildings that provide workspace to support sustainable business bases. For example Beechwood House is a grade II listed building in Newport, which has been refurbished as an Entrepreneurship Centre and the Ebbw Vale Institute, which is a grade II listed building and is the oldest institute in Wales, has been restored and now offers incubation space for local creative enterprises. The restoration of an important historic building or a wider heritage led regeneration programme can also stimulate further private and public sector investment in an area. The case study of Morgans Hotel in Swansea demonstrates how the conversion of a listed building can stimulate private sector investment in the visitor economy.

Townscape Heritage Initiatives (THI), funded by the HLF, support the repair and regeneration of the historic environment in towns and cities. To date, 26 THIs have been awarded in Wales and for every £1 million funded by the HLF, £620,000 is secured by partner organisations.

## Environmental Value

**Protecting the historic environment:** There are approximately 2,882 listed buildings at risk in Wales<sup>9</sup> but there is a strong case for regenerating these assets for the benefit of the building and also the wider area and community. There is already evidence of a range of restoration projects that have improved the quality of buildings at risk, thus removing them from the buildings at risk register and in many cases, bringing them back into use. Examples include Yr Hen Siop in Pembrokeshire, Troedrhiwfallen in Ceredigion and Allt-y-Bela in Monmouthshire.

**Maintaining environmental quality and biodiversity:** Conservation principles lie at the heart of all organisations that are operating in the historic environment sector. The restoration and ongoing maintenance of historic buildings improves the environmental quality of the building itself and the area surrounding it. Likewise, natural historic landscapes play a key role in supporting and conserving biodiversity. As examples, the natural environment of the canals, as demonstrated through the case study of Monmouthshire and Brecon canal, and the hillforts in Wales play important roles in supporting wildlife.

**Conserving energy by refurbishing historic buildings:** Significant reductions in carbon emissions can be achieved through refurbishing and reusing historic buildings, rather than building new structures. If an historic building is replaced, the energy embodied in the old building will be lost and further energy will be used in the demolition of the old building and construction of a new building.

### Footnotes:

<sup>9</sup> *Buildings at Risk in Wales, 2009, Cadw*

# Wider Value of the Welsh Historic Environment (cont'd)

## Social Value

**Promoting access to and understanding of the historic environment:** Organisations in the historic environment sector are constantly endeavouring to make the historic environment accessible to all, particularly individuals that do not normally engage with their local heritage. As examples, the sector supports informal learning through its publications and leaflets, archive resources, TV programmes, guided tours and events. This is further demonstrated through the case study of the Hidden Histories television programme. In addition, Open Doors Events provide free access to historic buildings across Wales. Organisations have also endeavoured to improve signage to raise awareness of the heritage assets in and around Welsh communities.

The Taking Flight theatre company performs outdoors at little-used Welsh historic sites with an integrated cast of disabled and able-bodied actors. It aims to make theatre and the Welsh historic environment more accessible to all people

**Increasing community identity and cohesion:** The heritage of an area is very important to local communities and is fundamental to sustaining traditions and establishing a sense of place. What is more, it often goes beyond its architectural or historic importance to contribute to local identity and memories. By helping people understand the past and future development of where they live, heritage can nurture community identity<sup>10</sup> and facilitate community cohesion.

**Enhancing civic pride:** If historic buildings become run-down and derelict, they can be a magnet for anti-social behaviour and vandalism. In contrast, high quality historic buildings can be a powerful stimulus for generating confidence in a local area and promoting civic pride. In turn this can play a key role in reducing crime, as highlighted in the case study of Erddig Country House and Gardens in Wrexham.

**Increasing community capacity and ownership:** The historic environment can act as a focal point for encouraging local communities to work together and take responsibility for the quality of their local historic environment. The HLF aims to help people to take an active part in and make decisions about heritage; in 2009/10, the HLF awarded £6.9m to 61 projects in Wales and in addition, indicative support totalling over £20 million was given to projects in Wales. Building Preservation Trusts, which breathe new life into old buildings, are also key examples of organisations that are driven by local communities for local communities.

The historic environment sector also offers a range of volunteering and training opportunities to enable local communities to participate in the conservation of the historic environment. Positively, many organisations in the historic environment sector are seeking to develop this further.

Arfordir encourages volunteers, who are trained by professional archaeologists, to help identify coastal archaeology sites affected by erosion in the Pembrokeshire Coast National Park and in Carmarthenshire and Ceredigion.

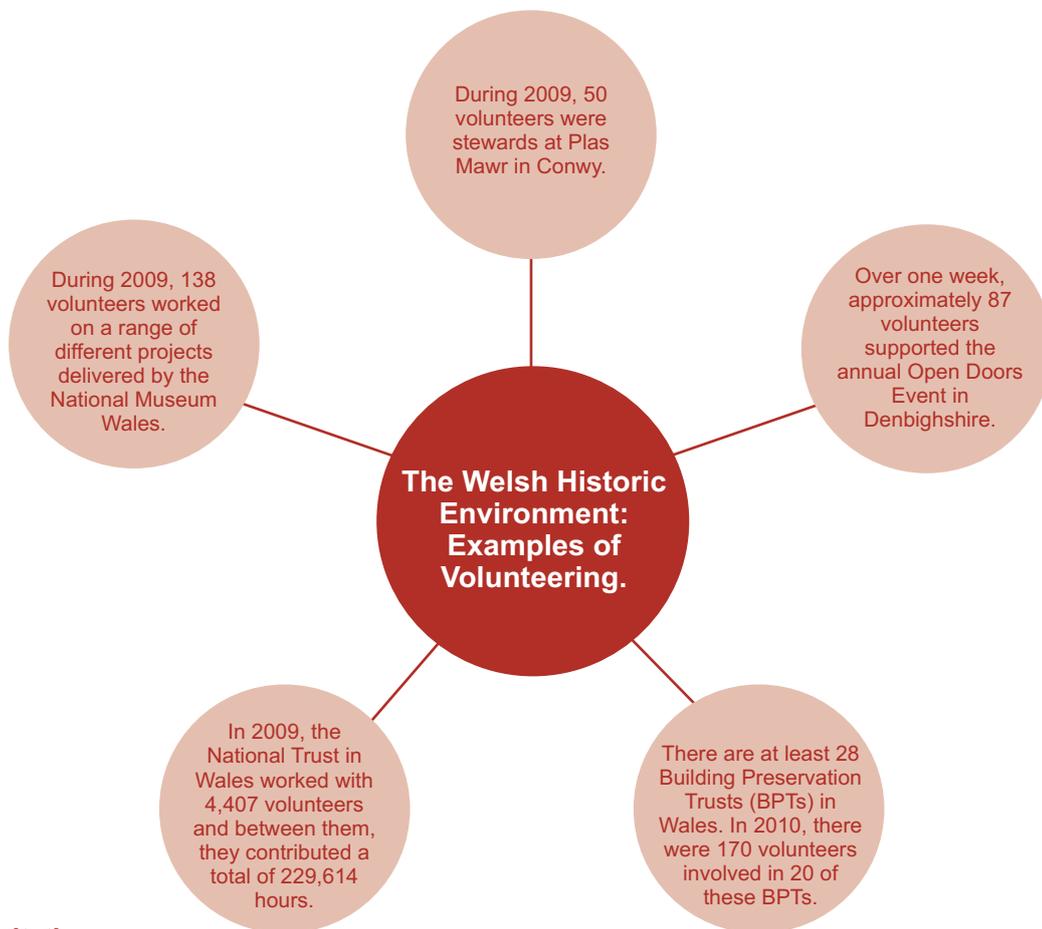
## Footnotes:

<sup>10</sup> *Scoping Study on the Socio-Economic Benefits of Heritage in the National Parks, 2008, CCRI*



Other examples of volunteering opportunities in the historic environment are outlined in the following diagram.

### Volunteering



**Source: Consultations**

**Encouraging wellbeing and enhancing quality of life:** The historic environment can support the wellbeing of local communities, which is defined as a positive physical and mental state<sup>11</sup>. In particular, it can enhance leisure and recreation activities, which in turn improves people's overall health, fitness and wellbeing.

Volunteering in a heritage capacity also contributes to a feel-good factor, for example the National Trust suggests that their volunteering opportunities can be a 'lifeline' for people that have recently suffered from poor health or illness.

The Regional Valleys Park is seeking to use disused railway lines to enhance the cycle and walking networks in the area and anecdotal evidence suggests that the historical environment is critical to the quality and experience of these routes.

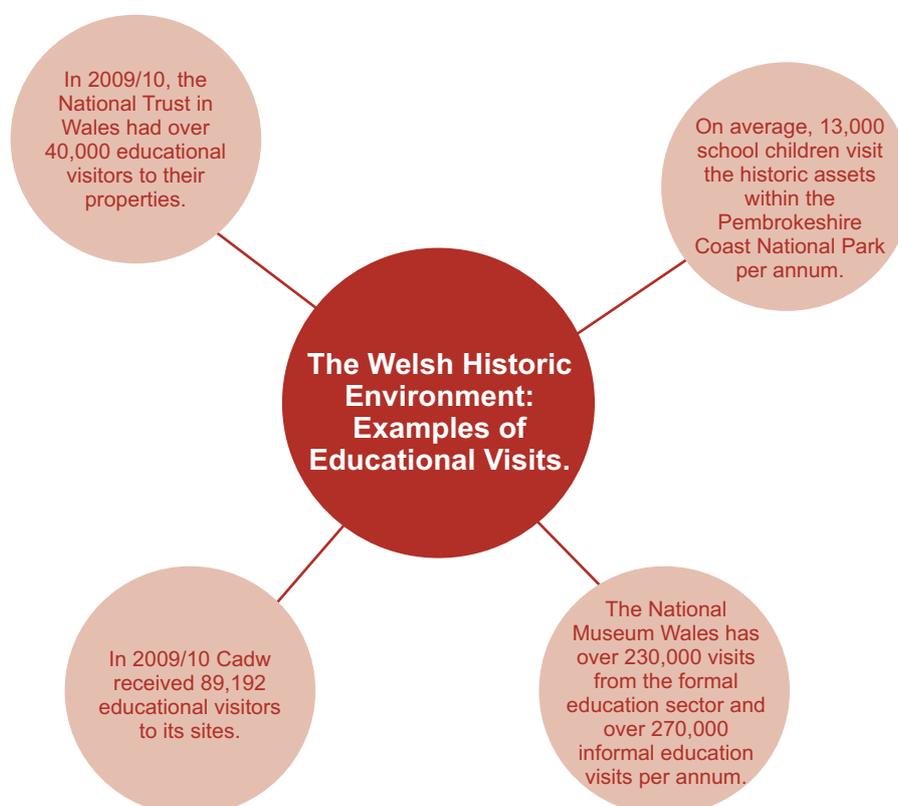
#### Footnotes:

11 Sustainable Development Indicators in your Pocket, 2008, Defra

# Wider Value of the Welsh Historic Environment (cont'd)

**Providing learning opportunities for people of all ages and supporting the national curriculum for Wales:** The historic environment offers significant opportunities for learning, both in terms of supporting the curriculum and facilitating extra-curricula learning. Educational visits are a key activity for many organisations that work in the historic environment sector, for example Cadw employs a full time Lifelong Learning Manager to facilitate a wide range of educational activities. There are also numerous examples of where organisations have developed educational resources and tools to support the national curriculum for Wales. One example is captured in the case study of the Castell Henllys Iron Age Fort in Pembrokeshire. The scale of educational visits within the historical environment sector is highlighted by a sample of organisations in the following diagram.

## Educational visits



**Source: Consultations**

## Case Studies

The following sections set out a series of case studies that demonstrate the qualitative value of the Welsh historic environment. The nine case studies were selected on the basis that they provide examples of:

- A range of different historic environment assets;
- A geographical spread of historic assets, including those in urban and rural areas;
- A range of different lead organisations, including those from the private and public sector; and
- A range of different benefits, including economic, social and environmental.



# Blaenavon World Heritage Site

## World Heritage Status as a catalyst for holistic, heritage-led tourism and regeneration.

### The Asset

The Blaenavon industrial landscape is located on the north eastern rim of the South Wales Coalfield and today shows evidence of extensive coal mining and iron-making that took place during the Industrial Revolution. The landscape includes an historic coal mine; 24 scheduled ancient monuments including the Blaenavon Ironworks; many listed buildings including those in the town of Blaenavon; the Blaenavon and Cwmavon Conservation Area; and the Monmouthshire and Brecon canal.

In 2000, a 33 km<sup>2</sup> area of the Blaenavon industrial landscape was inscribed as a World Heritage Site, which is the highest accolade a site can attain internationally in heritage terms. The World Heritage Site also lies within the Heads of the Valleys; one of Wales' strategic regeneration areas.

### Activities

The Blaenavon Partnership, which is led by Torfaen County Borough Council and comprises 13 different organisations, has managed a significant regeneration programme in Blaenavon. Activities have included: restoration of the Big Pit Museum; conservation of the Blaenavon Ironworks; creation of a World Heritage Centre; housing and commercial property renewal; environmental and landscape improvements; branding and interpretation improvements; and community events and activities

### Inputs

By the end of 2007, the Blaenavon World Heritage Site had catalysed the investment of £30.8 million in the area.

### Economic benefits

**Supporting tourism in Wales:** Blaenavon has developed its heritage tourism offer and as a result has seen visitor numbers increase by 100% over five years. As examples, in 2009:

- The Big Pit attracted 165,696 visitors;
- The Blaenavon Ironworks attracted 29,961 visitors;
- The Blaenavon Heritage Railway attracted 9,364 visitors.

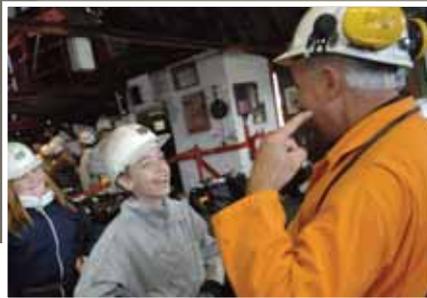
As a result, The Big Pit museum has safeguarded and created on-site employment and currently has 65 staff; all of whom are from the Valleys and around half are from Blaenavon. What is more, it is estimated that the overall economic impact of the museum is £4.93 million in terms of visitor spend, which supports 140 FTE jobs and contributes around £3.25 million in respect of GVA<sup>12</sup>.

**Stimulating private sector investment:** Blaenavon town has undergone significant improvements and has been re-branded as a heritage town. As a result, private sector investment has been stimulated, for example:

- At least ten new businesses have been established, many of which are niche, high quality shops that support cultural tourism.
- A private investor is currently refurbishing a large historic building in the town centre in order to develop a Bed and Breakfast with 11 bedrooms, a restaurant and a bar. This will play a key role in further developing the town's cultural offer by encouraging overnight stays.
- The largest major private housing development for the last fifty years has commenced. The layout and design has been developed to meet the high standards required within the World Heritage Site.
- Plans for a new brewery and visitor centre in Blaenavon have also been approved, which are expected to bring 19 new jobs to the area and further stimulate tourism. The strong mining heritage of Blaenavon and the Big Pit were key factors influencing this investment.

### Supporting the construction industry through conservation of the historic environment:

Significant construction work has taken place in Blaenavon in order to conserve its historic environment and as a result, over 100 jobs in construction have been created annually. Through this work, local building companies have also developed traditional building and conservation skills. As an example, a HLF grant of £5.4m was awarded to The Big Pit to improve the site and its facilities, including the restoration of 19 listed buildings. In addition, as part of its European Convergence funded Heritage Tourism Project, Cadw is planning on investing £1m by 2014 to further develop the Blaenavon Ironworks to improve access, visitor enjoyment and interpretation.



## Environmental benefits

**Conserving and re-using historic assets:** The main monuments, including the Blaenavon Ironworks and Big Pit Mining Museum have been the subject of major preservation works, ongoing protection and development as major visitor attractions. Blaenavon town centre, which contains many important 19th Century buildings, has also undergone significant conservation and improvement works, which have recreated original architectural features with details based on early photographs.

The work has resulted in:

- The outworn fabric of 500 properties made good.
- 75% of town centre dereliction made good.
- Town centre shops brought back into effective use.
- Important listed buildings, such as the former St Peter's Church School as the UK's first dedicated World Heritage Centre, the Workmen's Hall and the Blaenavon Library, restored and brought back into use.
- A 300% increase in property prices in five years (above the UK average).

## Social benefits

**Developing skills and volunteering opportunities to preserve the historic environment:** The Blaenavon Heritage Railway is managed and operated entirely by volunteers. Individuals receive training to enable them to operate, preserve and maintain the railway. In addition, volunteer rangers conserve and enhance the historic landscape.

**Changing perceptions and increasing civic pride:** Blaenavon has undergone significant improvements and has been re-branded as a heritage town within the overall World Heritage landscape. In addition, the Big Pit has been recognised as a National Museum of Wales and the Stack Square Cottages at Blaenavon Ironworks were the setting for the BBC 'Coal House' television series. As a result, perceptions of the area and its heritage are changing for the better and the level of community self-esteem and civic pride are increasing.

### Footnotes:

12 Welsh Economy Research Unit, 2009

### Images:

Main Image  
Concert at Blaenavon Ironworks,  
© Cadw, Welsh Assembly Government (Crown Copyright)

Small Images (left to right)  
Restored streetscene, supplied by Torfaen County Borough Council  
Tour of Big Pit, image used courtesy of Amgueddfa Cymru National Museum Wales

Blaenavon Heritage Railway, supplied by Torfaen County Borough Council



# Caernarfon Castle

## Maximising the role of an historic asset to support the wider economy and raise the profile of Wales' national heritage.

### The Asset

Caernarfon Castle is a medieval castle that was constructed as a military stronghold and also as a seat of government and royal palace for King Edward. In 1969, the castle received international attention as the setting for the investiture of HRH Prince Charles as Prince of Wales.

Caernarfon Castle covers 1.2 acres in total and due to its size, setting and architecture it is one of the most imposing medieval monuments in Wales. Caernarfon Castle is managed by Cadw and, along with the castles at Harlech, Beaumaris and Conwy, it forms part of the Castles and Walled Towns of Edward I in Gwynedd World Heritage Site, which was inscribed in 1987. Caernarfon Castle is one the largest, most well known and most visited castles in Wales, and is considered the flagship of Cadw's estate.

### Activities

Caernarfon Castle is a heritage visitor attraction that includes on-site exhibitions and a gift shop.

The castle holds 15 to 18 public events per year ranging from simple storytelling through to full re-enactment demonstrations and battles.

The castle delivers educational visits.

The castle also houses the Regimental Museum of the Royal Welch Fusiliers – Wales' oldest regiment.

### Inputs

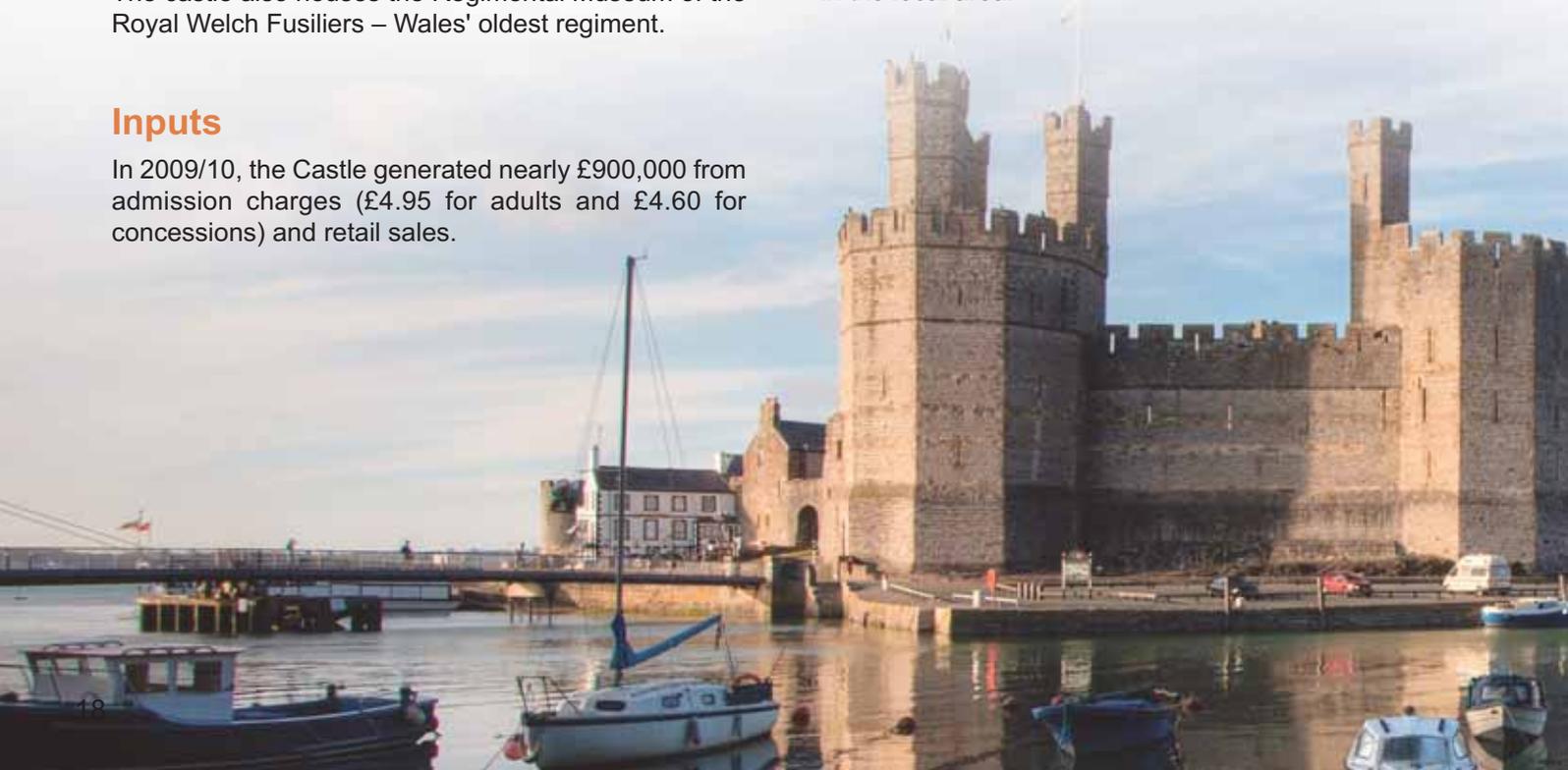
In 2009/10, the Castle generated nearly £900,000 from admission charges (£4.95 for adults and £4.60 for concessions) and retail sales.

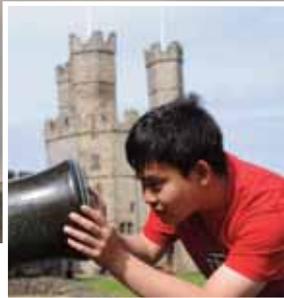
### Economic benefits

**Supporting tourism in Wales:** In 2009, Caernarfon Castle attracted 194,293 visitors, making it Cadw's top paid attraction and placing it sixth in the top ten paid visitor attractions in Wales<sup>13</sup>. Caernarfon Castle is an iconic heritage asset in Wales and has recently been used as part of an advertising campaign for Visit Wales ("Proper Holidays"), which endeavours to capture and share what a holiday in Wales is all about.

**Supporting the wider local economy:** The Castle is recognised as an important asset for the town of Caernarfon, as highlighted by the fact that the castle is a prominent feature of the town's Branding and Signage Strategy<sup>14</sup>. The average spend per visitor at Caernarfon Castle is £4.50 and the site directly supports 11 full time equivalent jobs but in addition to this, the Castle also plays an important role in supporting the town centre and local economy.

Given its scale and significance as a visitor attraction, the Castle draws visitors into the area, including many international visitors that arrive by cruise ships docking at Holyhead, and therefore helps to support other visitor attractions, plus local shops, restaurants and accommodation providers in the area. According to research conducted by Cadw, using the multiplier of £32,000 per full time equivalent job creation in the area, the Castle's turnover indicates that 28 jobs are created in the local area.





## Environmental benefits

**Contributing to environmental quality:** The income generated from admission charges to Caernarfon Castle, plus investment from Cadw, has helped to conserve a nationally important historic asset. What is more, given its size and location, the Castle plays a key role in contributing to the overall environmental quality and attractiveness of Caernarfon and the Môn Menai Regeneration Area. The Castle is also at the heart of the characterisation study for the Caernarfon Waterfront, which is produced by Cadw to inform the future regeneration of the Slate Quay and wider waterfront.

## Social benefits

**Remembering the history of Wales:** Caernarfon was the birthplace of the first English Prince of Wales, later Edward II, in 1284. It was the site of the investiture of Prince Edward (1911) and Prince Charles (1969) as Prince of Wales. Both events have helped raise the significance and profile of the Castle as a key monument in the identity and psyche of modern Wales. Many visitors come to Caernarfon because of this continuing Royal connection. Today the castle houses the Royal Welch Fusiliers Museum, which tells the story of the historic regiment of the British Army since it was established in 1689. It also provides the location for community events that bring people of all ages together to remember and celebrate Wales' history, for example the Veterans Day is held at the castle. On site interpretative exhibitions use a variety of media to trace the history of the Princes of Wales and their connection with the castle. In addition, an exhibition showing the links between the establishment of the castle and the development of Caernarfon as a town can be seen.

**Celebrating the culture of Wales:** Caernarfon Castle is part of an initiative to showcase the rich cultural diversity of Wales through a wide range of creative activities at historic sites. The initiative, Cauldrons and Furnaces, is part of the Cultural Olympiad, which aims to help ensure that the Olympics leave a legacy for young people. In 2009, a visual artist, a poet and a writer worked alongside surrounding Caernarfon schools to create a range of banners and flags using the Castle's history, symbols and myth. In addition, young people from a special needs school developed a short animated film at the Castle. Towards the end of 2010, work will begin on a spectacular planned for the Castle on the eve of the 2012 Olympics which will involve 850 local children and 8 artists in various workshops.

**Supporting education:** Caernarfon Castle provides educational opportunities in ways that help to make history come alive. On average, the Castle has around 6,000 educational visitors per annum, ranging from visitors from primary school visitors through to those from the University of the Third Age (U3A). As part of adult learners' week, Caernarfon Castle also hosts an annual learning festival, which offers arts, crafts, traditional skills and living history activities. In 2010, the festival attracted 600 visitors.

### Footnotes:

13 *Visitor Attraction Research, 2009, Visit Wales*

14 *Caernarfon Branding and Signage Strategy, 2008, Imagemakers*

### Images:

Small Images

© Cadw, Welsh Assembly Government (Crown Copyright)



# Cardigan Townscape Heritage Initiative

## Using a townscape heritage initiative as a stimulus for further investment in an historic town centre.

### The Asset

The Townscape Heritage Initiative (THI) is a Heritage Lottery Fund (HLF) grant giving programme for the repair and regeneration of the historic environment in towns and cities throughout the UK. Cardigan town is an ancient Welsh cultural and commercial centre, characterised by many Victorian buildings. The Cardigan THI was introduced to aid the preservation and restoration of the town's unique architectural landscapes.

The first phase of delivery, which was formally approved in December 1999 was viewed as such a success that a second phase was launched in October of 2004. Phase Two had far greater funding and the support of a number of key partners including the HLF, Welsh Assembly Government, Cadw and Menter Aberteifi.

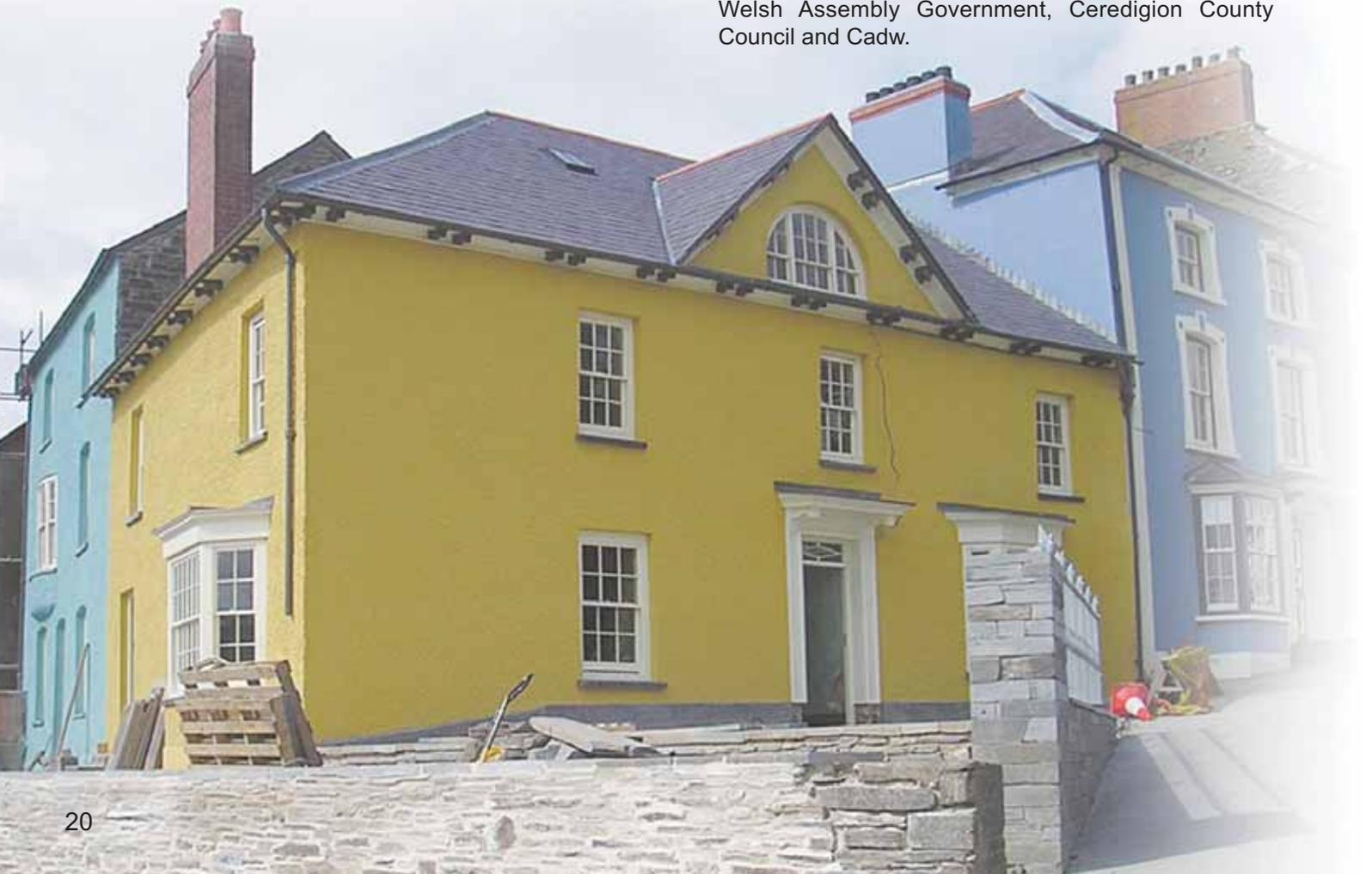
### Activities

Both phases of the programme have focused on the following areas: building repairs and the re-instatement of architectural detail; bringing vacant historic floor-space into use; infilling gap sites in key frontages; public realm works; and complementary initiatives such as training courses to up-skill local individuals and businesses in the use of traditional building techniques and educational activities for school children.

### Inputs

Phase One of the Cardigan THI received funding contributions totalling £571,000, which was principally provided by the Heritage Lottery Fund, Cadw and Ceredigion County Borough Council.

Phase Two of the THI was far larger with project costs totalling £3,145,000. Approximately, one third of this funding has been provided by the Heritage Lottery Fund with the remaining funding coming from Objective 1, the Welsh Assembly Government, Ceredigion County Council and Cadw.





## Economic benefits

**Creating an economically stable town centre:** As a result of work to repair and renovate shop frontages, plus improvements to the interior of shops (as a result of additional funding via the council's Housing Renewal Grant) and improvements to the public realm, the THI in Cardigan has been successful in improving the function of the town centre in terms of shopping, employment, housing and leisure. The number of vacant shops has also been reduced and the range and quality of the shopping offer has been significantly improved. Consequently, the town has seen a noticeable increase in the number of visitors. Importantly, the THI has played a key role in creating an attractive, individual town centre, which is considered to be key to securing an economically stable and sustainable future for Cardigan.

**Stimulating private and public investment:** HLF funding through the THI has helped to secure further funding from public sector organisations such as Cadw and Ceredigion County Borough Council. In addition, the owners of the buildings have supplemented the THI funding by providing a proportion of match funding from their own pockets.

**Integrating with local regeneration initiatives:** Activities funded under Phase One of the THI have also supported, and in some cases catalysed, a number of other publicly funded regeneration initiatives, including:

- A Town Improvement Grant (TIG) made available by the local authority to fund activities in the remainder of the conservation area adjacent to the THI;
- £5.9 million of Welsh Assembly Government funding towards the Cardigan and South Ceredigion Regeneration Plan;
- The proposed restoration of Cardigan Castle; and
- The re-building of the Prince Charles Quay and the creation of a Riverside Walk from Cardigan Bridge to the Somerfield Car Park.

**Developing traditional building skills:** Through the THI, expert advice on preserving a building's original features and utilising traditional building techniques has been provided. It has also funded training for locally based contractors and surveyors to learn traditional building skills such as lime plastering.

## Environmental benefits

**Restoring historic buildings:** Since the THI scheme was introduced, over 60 properties have received funding through the THI or TIG and of these, at least 13 were identified as being in 'critical' need of improvement. These grants have successfully enhanced the character and look of the historic properties in the town centre. Prior to the implementation of the THI, the town was neglected with many of its most prominent historic buildings in a derelict condition.

## Social benefits

**Supporting local identity and confidence:** The improvements to the town centre and residential properties have served to instil a sense of local identity and community pride in the area. A local community group called 'The Look of the Town' meets regularly and is a powerful lobbying force.

### Images:

Top right and bottom left images compare before and after restoration

All Images

© Cadw, Welsh Assembly Government (Crown Copyright)

# Castell Henllys Iron Age Fort, Pembrokeshire

**Interpreting historic assets in ways that effectively engage and educate visitors, school children and students.**

## The Asset

Castell Henllys is an Iron Age inland hill fort located in North Pembrokeshire that dates to around 600 BC. The Iron Age Fort is a scheduled ancient monument that has substantial defences, well preserved evidence of internal occupation and buildings, and a stone gateway. It is set within thirty acres of woodland and meadows and is the only Iron Age Fort to have roundhouses reconstructed on their original, archaeologically excavated foundations. The site is owned and managed by the Pembrokeshire Coast National Park.

## Activities

Castell Henllys is a visitor attraction, supported by a visitor centre, gift shop and daily tours. The site is also home to around 100 activities and events per year, including storytelling, traditional craft workshops and experimental archaeology. Castell Henllys has an education centre and each year it delivers an educational programme for schools. Archaeologists have also been excavating at the site for over twenty years.

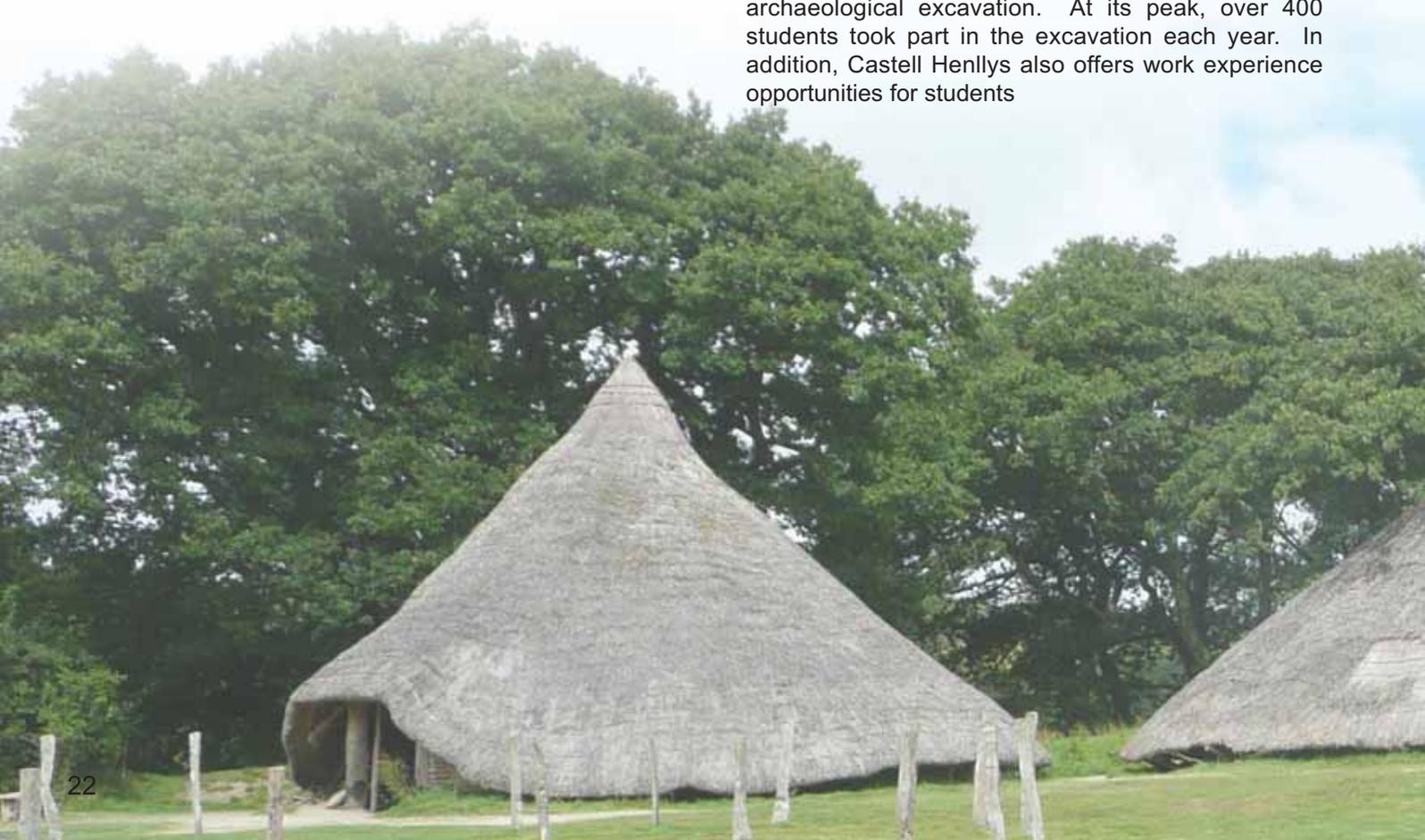
## Inputs

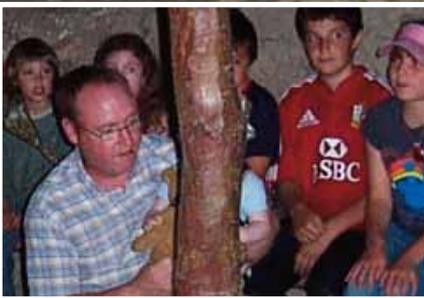
The operational running costs of Castell Henllys are approximately £55,000. Castell Henllys also secures an income through admission fees (£4.50 for adults and £3.00 for concessions) and merchandise sales.

## Economic benefits

**Supporting the local economy through tourism:** Castell Henllys is a key visitor attraction in North Pembrokeshire and in 2009, the site attracted 29,484 visitors<sup>15</sup>. Castell Henllys directly supports around eight employment posts at the site and by attracting visitors to the area it also plays a key role in supporting the wider, local economy. In recognition of this, it is now open all year round, thus encouraging local accommodation providers, shops and other visitor attractions, to open all year round as well.

**Providing training opportunities:** For over 20 years, Castell Henllys hosted one of the largest archaeological training excavations in Britain. The excavation was led by the University of York and for six weeks every summer, students from all over the world joined in the dig to learn the principles and methods of archaeological excavation. At its peak, over 400 students took part in the excavation each year. In addition, Castell Henllys also offers work experience opportunities for students





## Environmental benefits

**Restoring the historic landscape:** Thatched Iron Age buildings, including four roundhouses and a granary, have been reconstructed on their original, archaeologically excavated Iron Age foundations. The roundhouses have been constructed using traditional materials and building methods, including coppiced oak trees for the rafters, posts and ring beams, coppiced hazel bushes for the wattle walls and water reed for the thatched roof, plus hemp rope and twine. The 'Old Roundhouse' was reconstructed over twenty years ago and is the longest standing reconstructed Iron Age roundhouse in Britain.

## Social benefits

**Supporting the National Curriculum for Wales:** Castell Henllys has developed an innovative school's programme, which caters for up to 7,000 children every year from 200 schools across Wales. Children have an opportunity to meet people dressed in Iron Age clothes, experience myths and legends and explore Iron Age skills. The programme has been developed in partnership with the local education authority to ensure that it appropriately aligns with the Key Stage 2 curriculum. It is delivered on-site, where the reconstructed buildings are used to interpret Castell Henllys and the wider late prehistoric landscape of Wales, and followed up back in the school classroom.

In 2009, Castell Henllys won the Sandford Award for Heritage Education, which recognises good practice in delivering educational activities at historic assets.

**Encourages disadvantaged groups from local communities:** The majority of visitors to Castell Henllys are family groups and in recognition of this, the site delivers a range of activities that encourage visitors and residents to learn about the rich and varied history of the landscape. What is more, the site actively encourages disadvantaged groups from the community to join in. The site has sculpture trails that depict myths and legends, daily tours at the site take place and a range of activities and events are delivered. In 2010 events have focussed on listening to Celtic songs and fairytales, celebrating Celtic festivals, exploring the wildlife within the fort, and learning traditional craft skills.

### Footnotes:

15 Visitor Attraction Research, 2009, Visit Wales

### Images:

Main Image  
The Roundhouses, supplied by Pembrokeshire Coast National Park Authority

Small Images  
Activities at Castell Henllys, supplied by Pembrokeshire Coast National Park Authority



# Erddig Country House and Gardens, Wrexham

## Instilling a sense of civic pride and developing employability skills by involving local residents in the management of an historic asset.

### The Asset

Dating from the early 18th Century, Erddig House, which is located two miles south of Wrexham, was originally a family home that was donated to the National Trust in 1973. The house reflects the upstairs downstairs life of a gentry family over 250 years and is set in a formal garden and landscape park, which are the starting points for walks, bicycle and carriage rides through the estate.

The estate includes three tenanted farms and six tenanted cottages, a Motte and Bailey site, a number of outbuildings including stables, smithy, joiners' shop, sawmill and the only youth club in the country to be jointly run by the National Trust and a Community Council.

### Activities

The Erddig estate supports a wide range of activities:

On average, Erddig attracts around 110,000 visitors per annum that pay to enter the house and grounds, plus a further 250,000 who visit the surrounding parkland, which is free to access.

The site hosts a range of festivals, craft fairs, exhibitions, family fun days and open-air theatre performances.

It delivers education activities, including a Primary School Education Programme.

It also supports extra-curricula activities involving practical work on the estate for young people.

Erddig offers work experience placements for school pupils, college students and university students.

It delivers adult education and training courses related to the environment.

Erddig Youth Club, where young people support the maintenance and upkeep of the estate, is based at the estate.

The estate is also home to a range of conservation activities, such as conservation weeks and the Adopt a Woodland project.

### Inputs

Over the past five years it has cost the National Trust on average £890,000 per year to run Erddig Country House and Gardens and on average, the asset generates an income of £728,000 per year through admission fees, a tearoom, a shop and a bookshop. It also raises significant income (16%) through renting out the farms and cottages on the outlying parts of the estate. The National Trust currently has to subsidise the historic environment at Erddig by an average of £162,000 per year in order to achieve its twin aims of conservation and access – 'for ever for everyone'.

Many of the community activities at Erddig operate on a voluntary basis, and education programmes and work placements are supported by the local schools, colleges and universities.

### Economic benefits

**Developing employability skills:** Through the provision of formal training and work placements for college and university students, the estate and its staff impart the knowledge, skills and experience required to obtain employment in a range of conservation related occupations. On average ten NVQ courses, plus 20 to 30 shorter courses are delivered per annum. In addition, 15 to 20 work placements are offered per annum.

### Environmental benefits

**Increasing environmental awareness:** The Erddig house and estate hosts a range of environmental and conservation activities, for example Conservation Weeks, which involve young people in practical conservation tasks for weekends or during school holidays; the 'Adopt a Woodland' Scheme, which enables pupils from a local special needs school to manage an area of Lewis Wood in conjunction with the Warden; and adult activities that involve the ongoing maintenance of the gardens and supporting the running of the house. The purpose of such activities, whether with adults or young people, has always been to raise awareness about conservation and the need to look after the environment. Visitors and the local community learn about the various habitats on the estate and learn how to tend to and look after the grounds and the interior of the house.



## Social benefits

### **Stimulating civic pride and reducing youth crime:**

Due to Erddig's close proximity to local housing estates and the multiple public access points into the estate, Erddig used to experience high levels of vandalism and criminal damage. However, over ten years ago a community approach to managing the Erddig estate was developed, which encouraged local people to visit the estate and become involved in its management and conservation. A Youth Centre was also established, which engaged young people in education, training and conservation work at the estate, thus providing a distraction from involvement in criminal activity whilst also increasing their awareness and appreciation of the historic environment. Over the years, this approach has served to instil a sense of civic pride in the house and the surrounding estate. Local residents now view Erddig as a community asset to look after and conserve for future generations.

**Supporting inclusive communities:** The range of activities that take place at Erddig have served to bring the community together, for example young people work alongside older people. One such example is the community based talks which discuss a range of topics including volunteering opportunities, countryside management, nature conservation and the country code. In addition, people previously marginalised in society such as those not engaged in employment,

education and training (NEETs) and those on probation are welcomed and encouraged to engage in community activity at the estate. As a result, there is now a greater level of understanding and mutual respect between the various parts of the community.

**Boosting self-esteem and motivation:** Erddig has played an important role in raising the confidence and self-esteem of the local community. Engagement through work placements and youth centre activities are providing young people, including young offenders and NEETs, with first hand experience of a working environment whilst also increasing their confidence and facilitating the development of the necessary social and inter-personal skills needed to succeed in the world of work. In addition, The National Trust's volunteer scheme provides opportunities for over 250 individuals to contribute to the maintenance of the Erddig estate, which helps to increase the motivation and confidence of people, including those who are unemployed or retired.

#### Images:

Main Image  
Erddig Country House, © NTPL/Rupert Truman

Small Images  
Community engagement, supplied by Erddig National Trust staff



# Hidden Histories Television Series

## Using a television series to increase awareness and understanding of Wales' heritage.

### The Asset

*Hidden Histories* is a television series that focuses on the heritage of Wales. The series has covered a vast range of heritage assets, including, for example:

Pembrokeshire promontory forts

The Pillar of Eliseg

Pontcysyllte Aqueduct

Gaer Fawr hillfort

Upper Bank copper works, Swansea

Houses by Herbert North, Llanfairfechan

Medieval coastal fish traps, Fishguard

St David's Cathedral

World War I training trenches near Tenby

Vivian slate quarry, Llanberis

### Activities

The Royal Commission on the Ancient and Historical Monuments of Wales is the investigating body and national archive for the historic environment in Wales. *Hidden Histories* is a BBC television series, which follows the experts of the Royal Commission and partner organisations as they reveal new interpretations of the heritage of Wales. The programme was commissioned by BBC Wales and produced through a partnership between the Royal Commission and Element Productions. The first series was commissioned in 2008 and initially shown on BBC Wales and then also BBC4, which broadcast the programme across the rest of the UK. Due to the success of the programme, a second series was commissioned in 2009 and a third series is due to be shown in early 2011.

### Inputs

It is estimated that the Royal Commission contributed £14,000 in staff time and other costs per series. This was offset by £4,000 for image rights. The production budget was approximately £150,000 per series.

### Benefits

#### ***Increasing awareness and understanding of Wales' heritage:***

*Hidden Histories* has increased awareness of Wales' heritage among a diverse range of people, from both within Wales and further afield. This is demonstrated by audience figures that are collated by the BBC<sup>16</sup>, as outlined below:

- In 2008, the first showing of each *Hidden Histories* episode on BBC2 Wales had an average audience of 90,000 and by 2009 the average audience had increased to 101,000.
- Various repeats of the programme were also shown, for example Series 1 was shown three times on BBC2 Wales and twice on the BBC4 network, thus increasing the estimated total viewing numbers across the UK to almost 500,000 per episode.
- Figures are not available for iPlayer, but it is notable that episodes were regularly in the top four most popular programmes in the Wales category.
- The programmes have drawn an exceptional audience Appreciation Index of 87%, which is above the average for factual programmes.
- *Hidden Histories* attracted a wide ranging audience. It was particularly popular with those aged 65 and over but it also achieved the average in all other age groups, except the 25 to 44 year olds, for whom it scored less well. The first series attracted a greater proportion of viewers from the higher social classes but the second series saw a higher proportion of viewers from the lower social classes.
- Feedback from viewers frequently captured their amazement at the diversity of Welsh sites, buildings and subjects.



### **Stimulating greater interest in Wales' heritage:**

*Hidden Histories* has led to a number of spin-off benefits, which demonstrate that an enhanced interest in Wales' heritage has been stimulated, both among residents in Wales and those further afield. Evidence of these benefits are set out below:

- 1,641 copies of the *Hidden Histories* book and 383 copies of the Welsh-language edition *Trysorau Cudd* were sold in the first 18 months following publication.
- Use of Google Analytics to view changes in use of the Royal Commission website and Coflein, the national online database that collects information about the historic environment of Wales, showed that enquiries on both increased by approximately 10% compared with the months before the series.
- Clips from the *Hidden Histories* series are being included as content for the People's Collection, which is an online collection of Welsh history. The People's Collection aims to further stimulate interest in Welsh life and widen understanding of Wales' heritage.

- The programmes were initially only shown in Wales but subjects were picked up by organisations in the UK and overseas, such as the BBC News website, the national Geographic News in the USA and a number of blogs and interest group sites. This has stimulated interest in Welsh history among people from outside Wales.
- Anecdotal evidence suggests that the television series has played a role in encouraging people to visit historic assets in Wales.

### **Footnotes:**

**16** *End-of-Series Audience Summary for Hidden Histories (Nov-Dec 2008), 2008, BBC Wales and End-of-Series Audience Summary for Hidden Histories (Nov-Dec 2009), 2009, BBC Wales*

### **Images:**

Main Image

Filming *Hidden Histories*, © Crown Copyright RCAHMW

Small Images (left to right)

Open day at RCAHMW, guided walk, St David's Cathedral, © Crown Copyright RCAHMW



# Monmouthshire and Brecon Canal

## Improving a canal system to attract visitors and promote healthy lifestyles, whilst conserving biodiversity.

### The Asset

The Monmouthshire and Brecon Canal, which dates back to the 1790s, is land locked and divided into two parts; a continuously navigable stretch of 35 miles from the old market town of Brecon to Goytre, Five Locks and Cwmbran, and a further 17 miles from Five Locks to Newport (Crindau) and to Risca and Cwmcarn (The Crumlin Arm).

The navigable stretch of the canal (the primary focus of this case study), owned by British Waterways, includes two Scheduled Ancient Monuments and 117 listed structures including historic wharves and tunnels, plus numerous bridges and locks. This part of the canal also stretches through the Blaenavon World Heritage Site and Brecon Beacons National Park. The subsequent 17 miles, part owned by Torfaen, Newport and Caerphilly Councils, includes the Fourteen Locks Flight and Canal Visitor Centre at Newport.

### Activities

96% of canal use is on the land with over 3 million visits every year by cyclists and walkers. In addition, the canal supports the traditional activities of boating, which includes 47 hired boats in 2009/10, plus angling and canoeing.

The environment surrounding the waterway provides an important educational asset for local schools, for example *Wild over Waterways*<sup>17</sup> has developed a curriculum map detailing the subject areas and topics within the 7-11 curriculum that can be taught using the canal as a resource.

The entire stretch of the canal also represents an important tourism asset.

### Inputs

For the stretch of the canal that is owned by British Waterways, previous research<sup>18</sup> found that in 2006/07 £439,000 was spent on routine maintenance on the canal (capital and revenue).

In the case of the local authorities, each has access to different funding pots and have attracted differing levels of external funding, however all three authorities use their funding to maintain the canal and other associated assets such as footpaths and groundwork.

### Economic benefits

**Attracting visitors:** The mix of landscape, natural and built heritage inherent in a waterway, together with the ease of access, is a significant catalyst for tourism and related inward investment. Research conducted in 2007 estimated that, per annum, the Monmouthshire and Brecon canal owned by British Waterways attracted:

2,876,000 informal visitors, for example walkers;

125,000 cyclists;

16,000 anglers;

23,000 canoeists / boaters.

What is more, national trends since then have shown an almost 30% increase in visitor numbers to waterways operated by British Waterways in England and Wales and there is no reason to suggest that such trends have not been mirrored on the Monmouthshire and Brecon Canal. In addition, the visitor centre at Fourteen Locks, which was re-opened in May 2008, received 46,480 visitors in its second year of operation, a rise of 35% over its first year.

### Supporting the wider economy through tourism:

Tourism and recreation activities on the canal support a cluster of small and medium sized enterprises including marinas, hire companies, boat repairers, builder and chandlers, alongside pubs, restaurants, hotels and guest houses and visitor centres, such as those at Goytre and Fourteen Locks. What is more, in 2007, it was estimated that as a result of people visiting the Monmouthshire and Brecon canal, £17 million of expenditure was generated and through this visitor spend, plus the ongoing maintenance and restoration of the canal's structures, 390 FTE jobs were supported in the local area.

### Environmental Benefits

**Conserving biodiversity:** The Monmouthshire and Brecon Canal plays an important role in conserving the biodiversity of the area as the waterways and their surrounding areas provide valuable habitats for thousands of animals and plants. Waterways like the Monmouthshire and Brecon Canal are home to 19 priority species and are likely to be the temporary or permanent home of up to 100 more.



**Reducing carbon emissions:** The availability of well-maintained towpaths encourages people to walk or cycle rather than use their cars, leading to a reduction in congestion and carbon emissions. According to British Waterways<sup>19</sup>, it is estimated that for every kilometre of towpaths improved, 100 tonnes of carbon dioxide will be saved each year.

## Social benefits

**Encouraging health and well being:** One of the core outcomes associated with the recreational usage of the canal, plus its towpaths and cycle routes, is improvements to individuals' health and well-being. Canal towpaths are safe, flat and level paths. In addition, over 320,000 people (11% of the population of Wales) live within 5 miles of the Monmouthshire and Brecon canal. As a result, the canal towpaths are one of the most accessible and well-used facilities for

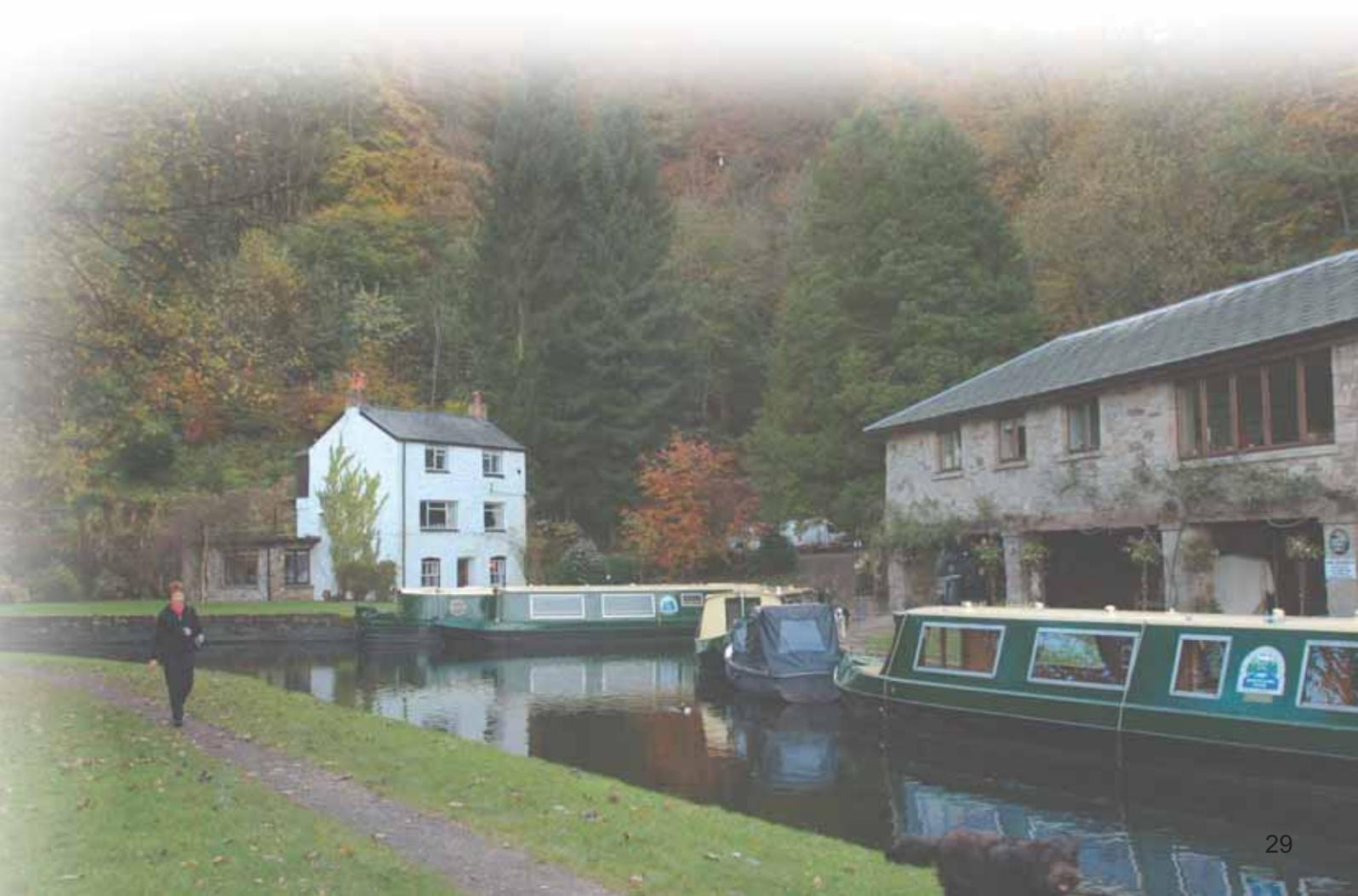
recreation in Wales. Improving the paths is an easy way to encourage more use (typically doubling use) and exercise (typically 63% of users will be more active) and in *Your Waterways – Our Vision*, British Waterways estimates that up to £18,000 of health benefits are derived from every kilometre of towpath improved. Alongside boating, increasingly, people are also using the canal for canoeing.

### Footnotes:

- 17 [www.wow4water.net](http://www.wow4water.net)
- 18 *Waterways in Wales: Economic Costs and Benefits of the Welsh Canal Network, 2007, ECOTEC Research and Consulting*
- 19 *Your Waterways – Our Vision, 2010, British Waterways*

### Images:

All Images © British Waterways



# Morgans Hotel, Swansea

## Converting a listed building to stimulate private investment in the visitor economy.

### The Asset

Morgans is a boutique hotel housed in a grade II\* listed building in Swansea. The building was previously home to the Swansea Harbour Trust, which was established in 1791 in order to enlarge and preserve the harbour of the town of Swansea. By the end of the nineteenth century, the business of the trust had increased significantly and trustees believed that they should erect a purpose-designed building which reflected the contribution of the trust to the economic well-being of the town of Swansea. The building was designed by Edwin Seward and when the building was opened in 1903, it was clear that the combination of effective design, superior quality materials and the work of talented craftsmen had produced an asset, not only to the Harbour Trust but to Swansea itself <sup>20</sup>.

The building had been derelict for a decade but in 2002, it was successfully converted into a hotel in a way that preserved its original character.

### Activities

A derelict Grade II\* listed building was converted into a hotel that now has 20 individual bedrooms; a restaurant and duo of bars; a meeting room and library that is available for business or social functions; and a licence for civil wedding ceremonies.

### Inputs

The building was bought in 2001 and at this time, the total cost of converting it into a hotel was £3 million (over an 18 month period).





## Economic benefits

**Contributing to wider regeneration:** When the building first opened, the reporter who covered the opening ceremony wrote: "the building has practically remodelled the whole appearance of this part of Swansea". The building is located between the maritime quarter and the city centre and arguably, when it was restored it played a key role in kick-starting significant regeneration in Swansea to better integrate the city with the sea.

**Supporting the local economy:** Morgans hotel employs around 70 staff and it directly uses approximately 40 local suppliers. In addition, the hotel hosts an event, "A Taste of Wales", which in an evening dedicated to celebrating all things home grown, such as unique cheeses and wines, welsh beef and lamb, and fresh fish and seafood. In addition to celebrating Wales' culture, this event also supports local businesses.

### **Attracting visitors and stimulating spin-off benefits:**

The hotel is recognised as a key gateway and focus for tourism activity in Swansea; over 200,000 people visit Morgans Hotel per annum for either accommodation or to use the restaurant and bars. In turn, these visitors support the wider economy, for example 61% of overnight visitors in South West Wales eat out / visit bars and pubs and 53% go shopping <sup>21</sup>.

## Environmental benefits

**Restoring an historic building:** The restoration of the building ensured that its original character was preserved, and from the outside the building appears to have changed very little. As examples, the bell tower, the stained glass, staircases, pillars and mouldings have all been retained and the Morgans Bar has the brick foundation walls, poured concrete floors and metal girders that were original to the 1920's building. The history of the building has also been reflected through the hotel's rooms by naming them after ships that were either registered or built in Swansea, for example John Bright (1864), Ambassador (1951) and Henry Belle (1903). The hotel has been described as "modern whilst paying homage to its past" and as a result of the restoration, Morgans Hotel was a category winner in the Lord Mayors Design Awards in 2003.

### **Footnotes:**

<sup>20</sup> [www.morganshotel.co.uk](http://www.morganshotel.co.uk)

<sup>21</sup> *Wales Visitor Survey 2009, Staying Visitors Report, April – October 2009, Visit Wales*

### **Images:**

All Images © Morgans Hotel



# Tywi Afon yr Oesoedd / Tywi – A River Through Time, Carmarthenshire

**Conserving an historic landscape by strengthening its links with the community and developing appropriate skills.**

## The Asset

The Tywi Valley extends from the Cambrian Mountains to its estuary mouth in Carmarthen Bay and is recognised as one of the most important historic landscapes in Wales. Within the valley there is a legacy of forts, stone castles, earth and timber mottes, and planted medieval boroughs. Tywi Afon yr Oesoedd is a project that focuses on celebrating and conserving the valley's landscape between Llangadog and Dryslwyn. Key partners are Carmarthenshire County Council, The National Trust, Countryside Council for Wales and Menter Bro Dinefwr.

## Activities

The Tywi Afon yr Oesoedd project is made up of four main themes:

**Exploration Tywi!**: Explores the Tywi valley's past through geological, archaeological and historical discovery.

**Landscape and biodiversity action:** Encourages farmers, landowners and community groups to maintain the important landscape features through a capital grant scheme and a range of community and environmental projects.

**Traditional Sustainable Buildings Centre:** Celebrates traditional buildings and the built environment by providing information and training opportunities in traditional building skills.

**Discover the Tywi Valley:** Offers a range of activities and events that interprets the valley in innovative ways that provoke and inspire the public.

## Inputs

Tywi Afon yr Oesoedd is a three year project costing £2.4 million. The project has principally been funded by the Heritage Lottery Fund and the Rural Development Programme. Carmarthenshire County Council, The National Trust, Countryside Council for Wales and Menter Bro Dinefwr have also provided additional funding, plus in-kind support, for example in terms of staff time.

## Economic benefits

**Enhancing traditional building skills:** The Traditional Sustainable Buildings Centre offers practical training courses associated with carpentry, joinery, stonework and lime-wash. What is more, these courses have been designed as part of an apprenticeship scheme that will allow students to work towards the Construction Skills Certification Scheme Heritage Cards. In its first 6 months of opening, the centre delivered 13 training courses, involving a total of 67 participants. The Centre has also provided four outreach sessions and events to help increase awareness and knowledge of traditional building skills that are needed to maintain the character and architecture in the Tywi Valley. As an example an open day held in May 2009 attracted around 200 people.

**Supporting businesses that conserve local culture:** Training and the provision of information on traditional building methods is supporting local building and trade companies. In addition, raising awareness of traditional foods, recipes and cooking methods synonymous with the area through a series of cooking courses and a Food Festival is helping to support local businesses.



## Environmental benefits

**Restoring historic buildings and structures:** Two historic buildings at Dinefwr Home Farm, which is owned by the National Trust, have been restored to develop the Traditional Sustainable Buildings Centre. It demonstrates that productive uses for redundant buildings can be developed whilst maintaining their character and contribution to the landscape. As part of the work of the Centre, a further three historic structures in the Tywi Valley have also been restored.

**Conserving the historic landscape and biodiversity:** The project has made 60 grants worth a total of £380,826 available to farmers, landowners and the community to improve the heritage landscape and the area's biodiversity. As a result, 1,378 trees will be planted, 14 ponds covering 5,412m<sup>2</sup> have been brought into management and 92 new project gates have been installed.

## Social benefits

**Increasing awareness and understanding of historic buildings and landscapes:** Community projects have increased awareness and understanding of historic buildings and landscapes, for example local businesses have been encouraged to research and share the history of their buildings, 30 story tellers educate people about the history of the area. In addition, interpretation at the Traditional Sustainable Buildings Centre has enabled people to learn about heritage materials and the development of an electronic resource directory for primary and secondary schools to help young people to learn about their culture, history and heritage. In turn, these activities have helped to increase the links between the local community and the local landscape to reinforce a sense of place.

**Stimulating community ownership and capacity:** Tywi Afon yr Oesoedd has delivered a range of projects that encourage communities and local groups to play a key role in maintaining the historic landscape of the Tywi Valley.

The projects have offered opportunities for volunteering and learning new skills through the provision of training, information sessions, expert support and grants. For example, 10 volunteers have attended walk leadership training and are now leading themed walks that relate to the key historical and natural features of the valley.

**Using heritage to encourage physical activity:** A series of events and outdoor activities have been held to bring the community together and encourage use of the historic landscape for physical activity. For example, Dinefwr Castle, Dryslwyn Castle and Paxton's Tower were the foci of an outdoor activity event, attracting hundreds of people.

### Images:

Tywi Valley & activities organised by the partnership  
All Images © Tywi Afon yr Oesoedd



# Conclusions

The key conclusions emerging from the research to value the Welsh historic environment are outlined below. It is important to note, however, that the results from the economic impact assessment should be interpreted as very conservative.

## **The Welsh historic environment sector is characterised by its richness and diversity and its importance has been internationally recognised**

There is a range of organisations whose primary remit is the conservation, maintenance and management of the historic environment but in addition to these, the historic environment also plays an integral, but sometimes implicit, role in the work of many wider public, private and voluntary sector organisations. The Welsh historic environment comprises almost 30,000 listed buildings and over 4,000 scheduled ancient monuments and the importance of Wales' historic landscape has been internationally recognised through the inscription of three sites on the World Heritage List.

## **The historic environment is a highly significant contributor to the Welsh economy**

Taking into account organisations comprising the 'inner cog' of the historic environment sector, the built heritage construction sector, together with expenditure resulting from tourists attracted to Wales principally because of the historic environment, it is estimated that the historic environment sector supports over 30,000 FTE jobs in Wales. In addition, it contributes some £840 million to Wales' national GVA, which is equivalent to 1.9% of Welsh GVA, and some £1.8 billion in respect of output.

## **A considerable share of economic impacts relate to tourism expenditure attributable to the historic environment**

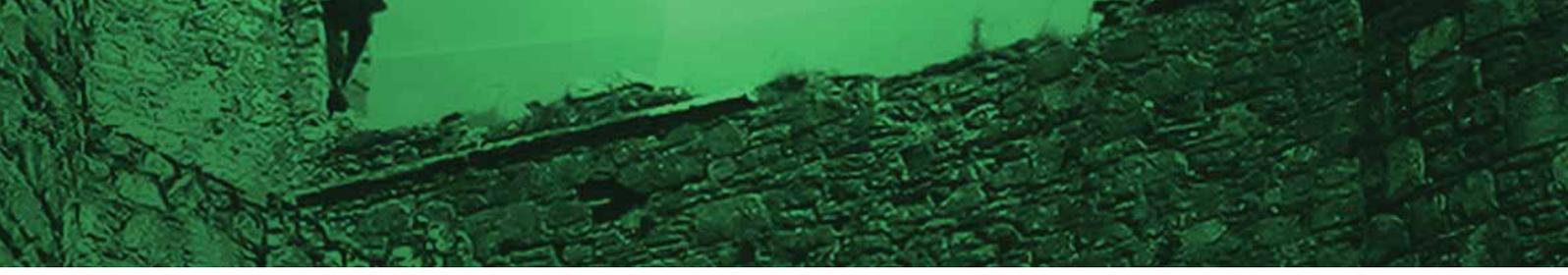
The historic environment is a significant factor in people choosing to visit Wales. The research states that one-fifth (20%) of total tourism expenditure represents a reasonable, if perhaps conservative, estimate of the importance of the historic environment sector in attracting visitors to Wales. As a result, tourism expenditure attributable to the historic environment is estimated to support some 14,900 FTE jobs in Wales, with this representing some £330 million in respect of GVA and more than £610 million in respect of output.

## **The historic environment makes an important contribution to the regeneration of both urban and rural areas**

The historic environment adds unique dimensions to the places where people choose to live, play and work. This can range from the adaptation of historic buildings for modern uses, to providing high quality settings for new development, to being catalysts for reviving run-down areas.

## **Conservation principles lie at the heart of all organisations operating in the historic environment sector**

The restoration and ongoing maintenance of historic buildings not only improves the environmental quality of the building itself but also of the area surrounding it. In addition, by re-using older buildings and making them more energy efficient significant carbon emission savings can be made compared to new build. Natural historic landscapes also play a key role in supporting and conserving biodiversity.



**The historic environment plays a key role in supporting the social wellbeing of people and communities**

The heritage of an area is very important to local communities and is fundamental to sustaining traditions and establishing a sense of place. High quality historic buildings can also be a powerful stimulus for generating confidence in a local area and promoting civic pride. In addition, the historic environment can act as a focal point for stimulating community cohesion.

**The historic environment represents an important resource for learning and training opportunities**

The historic environment offers significant opportunities for education, both formal and informal. In addition, a number of organisations in the historic environment sector have successfully developed conservation and traditional craft skills through training courses, apprenticeships and placements.

The Welsh historic environment is a valuable asset that plays a key role in enhancing the economic, social and environmental wellbeing of communities in Wales. The active care and promotion of this asset is essential; once elements have been lost or forgotten they can rarely be recovered.





Image: Brecon Beacons National Park