End of Programme Evaluation of the Heritage Tourism Programme

End of Programme Evaluation for the Heritage Tourism Programme

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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GLOSSARY OF ACRONYMS

BREEAM	Building Research Establishment Environmental Assessment Method
DDA	Disability Discrimination Act
E4G	Environment for Growth
EFAT	European Funds Audit Team
ERDF	European Regional Development Fund
EU	European Union
GVA	Gross Value Added
HTP	Heritage Tourism Project
KPI	Key Performance Indicator
PR	Public Relations
QR	Quick Response
TMF	Targeted Match Funding
UK	United Kingdom
WEFO	Welsh European Funding Office

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EXECUTIVE SUMMARY

Introduction

Old Bell 3 Ltd., in conjunction with Cardiff University, was commissioned by the Welsh Government to undertake a final evaluation of the Heritage Tourism Project (HTP). The aim of this evaluation was to assess the success of the HTP in meeting its targets, its effectiveness in terms of how it was delivered and the difference the investment made to organisations and visitors.

The Heritage Tourism Project

Funded via the European Regional Development Fund (ERDF), the HTP aimed to maximise the economic value of heritage in Wales by increasing the number, length and value of visits to Wales. The project also aimed to open Wales' heritage to a wider audience by making it more enjoyable both for visitors and for people who live in Wales.

The project was led by Cadw with an overall fund of £19 million, £9 million of which was made available by the Welsh Government (via Cadw and the Targeted Match Fund), £8.5 million of ERDF under Priority 4, Theme 3 Environment for Growth (E4G) of the 2007-2013 Convergence Programme and the remaining funding from other delivery partners. The project commenced in 2009 and was initially expected to run until December 2014. An extension was approved and the project ended on 30 June, 2015. In all, the HTP funded 25 initiatives, 11 of which were delivered by Cadw and the remaining 14 by external partners. Over the course of its delivery the HTP invested £18.132 million of its allocated budget.

Method

The evaluation report is based on a work programme undertaken between July and September 2015 which involved:

- attending a planning meeting with the Evaluation Steering Group to agree the research methodology for evaluation

- reviewing documents relating to the design and delivery of the HTP, including the project's business plan, progress reports and project monitoring and output data, with a view to assessing the extent to which project targets were met
- undertaking a desk based review of wider policy literature relating to heritage tourism in Wales
- preparing semi-structured discussion guides for use with Cadw staff, external stakeholders and representatives from HTP funded initiatives
- interviewing representatives involved with 14 HTP funded initiatives led by external organisations, including staff from across six local authorities and the Welsh Government
- interviewing ten Cadw staff as well as six Cadw Custodians based at HTP funded sites
- interviewing Visit Wales and WEFO officials
- analysing project outputs and achievements to undertake a final assessment of the economic impact of the HTP.

Key findings

The HTP was conceived and developed against a supportive Welsh policy context and was well rooted in, and aligned with, key Welsh Government policies at the time. During the course of the project's implementation, the Welsh policy context remained supportive of the underlying project objectives. Strategic documents which were published during the project's lifespan provided an additional level of detail which helped inform its delivery, in-line with its original objectives.

The HTP made very good progress against its WEFO funded targets having achieved two of its three key performance indicators. It developed the natural and/or historic environment at 25 sites, generated 809,262 visitor visits and created 5.4 new full time jobs (against a target of 8.8). Our fieldwork found that the project had under-reported its achievements against two of its funded targets, as visitor data was only reported for 13 of the 25 funded initiatives supported and that the creation of jobs was only considered for one funded

initiative (in addition to the core project management team employed by Cadw). Indeed our own research showed that the HTP had helped create new jobs across at least five of the funded initiatives and these jobs had not been reported at project outputs to WEFO.

The lack of robust monitoring data for externally funded initiatives, together with a lack of original targets made available to the evaluation team for Cadw led initiatives, made it very difficult to come to a view about the success of otherwise of individual initiatives. Where such data was available the review found that none of the individual initiatives had achieved their respective visitor targets by December 2014.

The main factors which accounted for the under-performance of individual initiatives were delays in commencing project delivery (which impacted upon initiatives' ability to meet their targets within the original timescales set) and the lack of post-investment visitor numbers available, given that several initiatives had only completed work during 2015.

We concluded that the HTP was successful in:

- meeting its twin aims of improving Welsh heritage destinations and producing visitor focused heritage interpretation at these sites
- adopting an inclusive approach to funding a wide range of initiatives which were in keeping with the overall aims and objectives of the project
- transforming the quality and attractiveness of some key heritage sites
- proving effective in enabling the development of successful partnerships to deliver individual initiatives
- performing very well against its cross cutting themes aims and objectives and we encountered excellent examples of how initiatives had fully embraced both environmental sustainability and equal opportunities objectives

- resulting in a marked difference to visitor experiences at the supported sites as well as a modest difference to visitor numbers at least 11 of the sites supported.

In terms of impact, the evaluation reported that the HTP investment could be connected with impacts of around £19 million of GVA per annum and that this supported employment of around 1,000 full time employees. The additional tourist visits associated with externally funded initiatives could be expected to lead to an increase in Welsh GVA of £0.5 million leading to 27.5 FTE job opportunities (if we are to assume that 25% of visits were genuinely additional ones) or an increase in Welsh GVA of £1.01 million leading to 55 FTE job opportunities (if we are to assume that 50% of visits were additional).

In terms of key lessons we further conclude that the HTP:
- was overly-ambitious in terms of the number of initiatives funded when considering the staffing resources available at the project level
- underestimated, at an individual level, the resources required for initiatives to manage their own developments, particularly in terms of meeting the demands placed upon them to comply with EU financial and reporting monitoring requirements
- missed opportunities to strengthen the linkages across the 25 funded initiatives involved in the project and that greater support could have been made available to externally led initiatives.

We make nine recommendations for the delivery of any future similar project, namely that:
- appropriate mechanisms be put in place to capture and report upon all outputs achieved across funded initiatives, so as to ensure a future similar project does not under-report against its performance indicators to WEFO
- greater consideration be given to a more consistent method of defining, monitoring and reporting project outcomes from the outset. This would include allocating an appropriate budget for undertaking baseline, mid-term and final reviews.

- any future project invests in developments which are more start-ready than was the case with HTP, to ensure that delays are minimised
- the project sponsor encourages greater contact and collaboration between funded initiatives so as to achieve greater spatial, thematic and chronological links
- any funding opportunities be adequately promoted (drawing on the good practice demonstrated within the HTP) and where possible, that issues relating to securing match funding be addressed
- it funds a smaller number of more strategic initiatives and that the selection of those initiatives be determined by considering the benefits which are likely to be achieved against a small number of economic impact criteria
- the lead partner responsible for any future similar project resources an adequate core team to manage the project
- formal procurement guidance be developed and agreed at the outset between WEFO, the lead sponsor and any other partner organisations involved in the delivery of a future similar project
- a future similar project develops and adopts a clear communication and promotional strategy which sets out the expectations for the lead body as well as each individual initiative, and that these requirements are set out in any delivery funding agreement.

1.   INTRODUCTION

Background

1.1 Old Bell 3 Ltd., in conjunction with Cardiff University, was commissioned by the Welsh Government to undertake a final evaluation of the Heritage Tourism Project (HTP).

1.2 Funded via the European Regional Development Fund (ERDF), the HTP aimed to maximise the economic value of heritage in Wales by increasing the number, length and value of visits to Wales. The project also aimed to open Wales' heritage to a wider audience by making it more enjoyable both for visitors and for people who live in Wales.

1.3 The project was led by Cadw with an overall fund of £19 million, £9 million of which was made available by the Welsh Government (via Cadw and the Targeted Match Fund), £8.5 million of ERDF under Priority 4, Theme 3 Environment for Growth (E4G) of the 2007-2013 Convergence Programme and the remaining funding from other delivery partners. The project commenced in 2009 and was initially expected to run until December 2014. An extension was approved and the project ended on 30 June 2015. In all, the HTP funded 25 initiatives, 11 of which were delivered by Cadw and the remaining 14 by external partners.

Evaluation aims and objectives

1.4 The aim of this evaluation was to assess the success of the HTP in meeting its targets, its effectiveness in terms of how it was delivered and the difference the investment has made to organisations and visitors. Thus, the overarching aims of the evaluation were:
- to conduct a review of project outcomes against key performance indicators

- to assess the effectiveness and efficiency of project delivery in achieving project aims and objectives

- to understand the added value of the project for beneficiaries (i.e. organisations in receipt of grant funding and visitors of sites)

- to identify and determine the nature of any unintended outcomes not covered by the WEFO key performance indicators

- to assess the project's delivery against the cross cutting themes aims, objectives and indicators, including the use of the Welsh language.

1.5 Underpinning these aims were a series of specific objectives which were presented in the evaluation specification as a series of research questions:

- how and to what extent did project activity reflect the commitments set out in the business plan?

- what are the perceived outcomes for the project from the perspective of beneficiaries? How and to what extent is this making a difference compared to if the improvements had not been implemented?

- based on evidence, what would be the outcome, and potential long term impacts, of withdrawal of future project funding for beneficiaries of the project?

- which aspects of project delivery have led to positive outcomes, or could be viewed as good practice?

- what barriers and constraints has the project faced? What are the lessons learnt from dealing with such barriers and constraints?

Method

1.6 This evaluation report is based on a work programme undertaken between July and September 2015 which involved:
- attending a planning meeting with the Evaluation Steering Group to agree the research methodology for evaluation

- reviewing documents relating to the design and delivery of the HTP, including the project's business plan, progress reports and project monitoring and output data, with a view to assessing the extent to which project targets have been met

- undertaking a desk based review of wider policy literature relating to heritage tourism in Wales

- preparing semi-structured discussion guides for use with Cadw staff, external stakeholders and representatives from HTP funded initiatives

- interviewing representatives from a total of 14 HTP funded initiatives led by external organisations, including staff from across six local authorities and the Welsh Government

- interviewing ten Cadw staff as well as six Cadw Custodians based at HTP funded sites

- interviewing Visit Wales and WEFO officials

- analysing project outputs and achievements to undertake a final assessment of the economic impact of the HTP.

Structure of this report

1.7 In the remainder of this report, we firstly consider the policy context for the HTP (Chapter 2) before discussing the aims and objectives of the project (Chapter 3) and its performance against targets (Chapter 4). We then review the project's implementation (Chapter 5), as well as its performance in relation to expenditure (Chapter 6) and the cross-cutting themes (Chapter 7). Chapters 8 and 9 consider the outcomes and impacts achieved by HTP whilst Chapter 10 explores the sustainability of the investments made and future plans. Finally in Chapter 11 we present our conclusions and recommendations.

2. POLICY REVIEW

Introduction

2.1 In this chapter, we consider the background policy context against which the HTP was designed and implemented. In particular, we explore (from a policy perspective) the role of heritage sites in attracting tourism to Wales. The chapter provides an overview of the policy context and considers a number of specific policy and strategy documents of direct relevance to the HTP.

2.2 The analysis in this chapter is based on a desk review of key policy documents and evidence from some of the qualitative stakeholder interviews with regards to specific documents, policies and strategies at a local and national level deemed to be of relevance to the HTP.

Policy overview

2.3 The EU Structural Funds programmes in place for the 2007-13 period had a strong focus on the Lisbon and Gothenburg strategies for growth, jobs and sustainable development. The ERDF Convergence Programme for West Wales and the Valleys was aligned with a number of the (then) Welsh Assembly Government's policies for delivering sustainable growth and jobs in Wales in order to maximise the impact of the funds:

- Wales: A Better Country (2003)
- The Wales Spatial Plan (2004, updated 2008)
- Starting to Live Differently: The Sustainable Development Scheme of the National Assembly for Wales (2004)
- Wales: A Vibrant Economy (2005)
- The Environment Strategy for Wales (2006)
- Economic Renewal - A New Direction (2010)

2.4 One of the key drivers within the ERDF programme for achieving the Convergence programme's aim of making West Wales and the Valleys 'a vibrant, entrepreneurial region at the cutting edge of sustainable development' was to create 'an attractive environment for people in which to live and work'[1] which would be achieved via five main Priorities.

2.5 The HTP was identified as one of a suite of projects that would help to deliver against the ERDF Priority 4 Theme 3 Environment for Growth framework as outlined below:

Priority 4: Creating an attractive business environment

Objective: To promote sustainable business growth and new business opportunities in relation to future environmental challenges and opportunities.

Theme 3: Environment For Growth

This theme aims to realise the economic potential of the natural environment. This will be achieved by:

- promoting the enhancement and protection of the natural, built and heritage environment; and
- increasing the economic potential of the environment.

Indicative activities:

- enhancing and improving the attractiveness of existing, or the development of new, natural and manmade facilities, including the development of centres of excellence;
- physical infrastructure that will bring economic benefits such as marinas, cycle and walking trails (for recreation rather than for transport), as well as ancillary services and facilities;
- initiatives, such as coastal footpaths, as well as other routes that will provide improved access to the coast and countryside, and that have significant economic benefit;
- developing the potential for sustainable recreation and economic activity linked to the natural environment, for example, around

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[1] Welsh European Funding Office, West Wales and the Valleys Convergence Programme - Operational Programme for the European Regional Development Fund 2007-2013, p.8

> important conservation and Natura 2000 sites.
>
> We expect that this theme will absorb around a third of the resources for this priority.[2]

2.6 The HTP's Business Plan also outlines the project's proposed role in contributing to several aspirations set out in the Assembly Government's *One Wales* document at the time of the project's inception. Specifically it made reference to the project's contribution towards:

- Promoting tourism by drawing on our unique assets in culture, history and the environment[3]
- Creating jobs across Wales[4]
- Tackling climate change[5]
- Improving access[6]
- Encouraging physical activity and promoting health[7] .

2.7 By 2011, the new Welsh Government's strategic priorities, outlined in their Programme for Government also included the key aim to 'enrich the lives of individuals and communities through our culture and heritage'. The Programme for Government outlined a particular role for Cadw in inspiring young people and enabling greater access to culture for those growing up in poverty.[8]

2.8 The Heritage Tourism Project has clear links to a number of additional key policies and strategies which are outlined in more detail below.

Wales Spatial Plan

2.9 The Wales Spatial Plan – People, Places, Futures was first adopted as the Welsh Government's strategic approach to sustainable development in 2004, and was updated in 2008. The main vision and purpose of the plan

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[2] Ibid., p.128-9
[3] Cadw, Heritage Tourism Project Business Plan, p.15
[4] Ibid., p.13
[5] Ibid., p.30
[6] Ibid., p.19
[7] Ibid., p.36
[8] Welsh Government, 2014, Programme for Government – Progress report, p.9

remained unchanged however, and set the context for local and community planning whilst aiming to increase understanding of the interactions between places.

2.10   The core principle of the plan was to improve quality of life for citizens 'by integrating social, economic and environmental objectives in the context of more efficient use of natural resources'.[9]

2.11   Whilst the updated Spatial Plan highlights both the Environment Strategy for Wales and the Welsh Coastal Tourism Strategy as specific achievements from the first plan in terms of the way they have based their actions on spatial determinants, it also identified that spatial planning should become more integrated within other priority policy areas including community regeneration, rural development and culture.[10]

2.12   The destination management approach to the HTP had a clear affinity with the spatial and geographical approach of the Wales Spatial Plan, and there were several relevant references to the historic environment in the 2008 update of the Spatial Plan including:

- valuing our environment – 'Make better use of opportunities linked to the environment: in each Spatial Plan Area identify sustainable tourism and leisure opportunities and ways to realise them'
- sustainable communities – 'Encouraging the identification, celebration and protection of local and historic character and distinctiveness that give all communities a unique sense of place'
- respecting distinctiveness – 'Developing and promoting distinct identities for key settlements and landscapes by encouraging sustainable design initiatives that …reflect local distinctiveness and protect the historic environment[11]'.

2.13   Within all Spatial Plan Area statements, the role of heritage, archaeology and/or the historic environment in developing tourism and

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[9] Welsh Assembly Government (2008), People, places, futures – The Wales Spatial Plan update, p.3
[10] Ibid., p.21
[11] Ibid., p.34-35

enhancing the distinctiveness of the area was also recognised. As a result, the HTP's Business Plan identified opportunities for the innovative packaging of features and stories within the interpretation plans to contribute to the ability of destinations to promote heritage sites more successfully to visitors and tourism operators. The HTP identified a key role for individual schemes in contributing to the 'leisure and business offer of the spatial plan area of which they are part' from the outset.

Partnership for Growth: Strategy for Tourism 2013-20

2.14   Visit Wales launched a 'Partnership for Growth' strategy for tourism in 2013, building on the previous 2006-13 national tourism strategy, 'Achieving our Potential'.

2.15   Total tourism spend in Wales during 2011 was estimated at £4.5bn, representing a tourism gross value added (GVA) of £1.8bn, which is around 4.4 per cent of total direct GVA for the Welsh economy[12].

2.16   Despite intense international competition from other destinations, the strategy aims to grow tourism earning in Wales by 10 per cent or more by 2020. It aims to achieve this by targeting the domestic market in particular, which for the first time includes promotion directed at attracting visitors from within Wales itself. The main region of origin for holidays and trips to Wales continues to be from within the country and there is recognition of the need to target tourism marketing and promotional activity at these visitors too. The strategy has a focused 'product-led' approach to developing the tourism industry in Wales with a specific emphasis on developing iconic and high-quality products and events which make better use of 'historic and distinctive buildings', developing more 'all year round attractions, activities and cultural experiences' and creating 'more innovative, unusual and distinctive products'.[13]

2.17   The strategy clearly identifies the important role of heritage and a strong cultural identity plays in attracting visitors to Wales, highlighting in

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[12] Welsh Government, Partnership for Growth: Strategy for Tourism 2013-2020, p.7
[13] Ibid., p.13

particular the role landscape and the three World Heritage sites has in telling the 'unique story of our past' and bringing it alive to both visitors and local communities.[14] The strategy also recognises the importance of making the most of the opportunities which exist via heritage attractions, museums and cultural venues 'to enhance the experience of visitors' and identifies key organisations including Cadw, the National Trust, local authorities and National Museums Wales to work in partnership with Visit Wales in order to achieve this.[15]

2.18   A clear focus of the strategy revolves around building a sense of place, and in particular, the need to develop a high quality environment for the visitor at a tourism destination level, whilst also recognising that tourism can play an important role in contributing to spatially focused regeneration programmes in Wales.

2.19   As visitors increasingly seek 'authentic experiences in their choice of things to see and do' the strategy argues that a strong destination management approach enables communities to be more involved in providing local support which can maximise visitor satisfaction. Therefore, tourism infrastructure such as signposting, car parking and tourist information can all make the difference in providing a positive experience for the visitor, and the strategy highlights the importance of bringing local stakeholders together to fully exploit opportunities for growth. While the strategy cautions against viewing tourism as a 'panacea' to all economic and social problems, it does suggest that 'regeneration schemes that can promote associations with local culture can help to support tourism and also instil local pride and identity'.[16]

Cultural Tourism Action Plan for Wales

2.20   A cultural tourism steering group was established in 2008 as a result of 'Achieving our Potential 2006-13' the national tourism strategy, to develop a cultural tourism action plan for Wales aimed at providing a strategic

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[14] Welsh Government, Partnership for Growth: Strategy for Tourism 2013-2020, p.12
[15] Ibid., p.22
[16] Ibid., p.27

direction to the development of initiatives which maximise the impact of Wales' cultural tourism assets. The steering group included representatives from a number of Welsh Government departments including Visit Wales, Cadw, Museums Archives and Libraries Wales (CyMAL), and National Museums Wales.

2.21   The action plan defined the cultural tourism product of Wales as including 'performing, visual and literary arts, museums, built and social heritage, historic landscapes and gardens, crafts, architecture, design, film, religion, broadcasting and food…'[17], the promotion of which contributes significantly towards both the sustainability of the tourism industry and to community regeneration and well-being.

2.22   The Welsh Government recognised the role of culture and heritage in furthering tourism development opportunities and a Cultural Tourism Action Plan was prepared for 2008-11 which included a specific action to 'improve physical access and interpretation of Wales' key heritage sites, through Cadw's Heritage Tourism EU Convergence project'.[18] A successor action plan was subsequently developed by the Cultural Tourism Partnership and Steering Group for implementation during 2012-15.

2.23   Within the 2012-2015 action plan, UK visitors to Wales are classed as 'casual' or 'accidental' tourists where cultural activity is not their main purpose for travel but nevertheless contributes to their ultimate choice of destination. Overseas visitors on the other hand are described as 'pure' cultural tourists, who are much more likely to specify a cultural or historic site as a main reason for their visit to Wales.

2.24   The Cultural Tourism Action Plan set out three main aims to be achieved during its three year implementation:

- 'to increase the number of visitors to Wales that are visiting heritage and cultural attractions and events

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[17] Ibid., p.1
[18] Visit Wales, Cultural Tourism Action Plan 2012-15, p.7

- to increase the proportion of visitors to Wales who feel their trip has delivered a strong Welsh experience; and

- to increase the value of holidays and number of trips which involve a cultural activity.' [19]

2.25   The plan also recognises the importance of continuing to improve the visitor experience to cultural sites through the presentation of 'authentic, compelling and distinctive stories about Wales' via 'stimulating visitor interpretations'[20] and set out to achieve this via the continuing roll out of the Heritage Tourism project and the pan-Wales interpretation strategy.

Historic Environment Strategy for Wales

2.26   In 2011, Cadw set out how the historic environment could deliver tangible benefits for Welsh communities and contribute to economic growth and renewal in its Historic Environment Strategy for Wales. The strategy highlighted the important contribution of the historic environment sector to the Welsh economy in its support of over 30,000 jobs and its £840m GVA contribution to Wales via 30,000 listed buildings, 4,000 scheduled ancient monuments and three World Heritage sites[21].

2.27   The strategy recognised the need to open up heritage sites so that not only tourists, but also Welsh communities can engage with their local heritage and gain 'a sense of themselves', whilst continuing to conserve and maintain the historic environment sensitively. In order for the historic environment to survive and flourish, the strategy argued that it has to be valued and understood and as such, it proposed the development of an all-Wales collaborative framework to facilitate three inter-related areas to support the historic environment. Firstly, conservation and sustainable management, secondly, increasing knowledge and understanding and thirdly, promotion, interpretation and access of sites.[22]

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[19] Ibid., p.3-4
[20] Ibid., p.7
[21] Cadw, Historic Environment Strategy for Wales, p.2
[22] Ibid., p.5-6

2.28   Key priorities within the strategy include widening public participation and facilitating understanding and enjoyment of historic sites. In this context, the strategy highlights the Programme for Government commitment to deliver a Pan-Wales Heritage Interpretation Plan and specifically, the Heritage Tourism Project. The strategy also argued that developing new and broader audiences can therefore be achieved through a creative and innovative approach, taking on board the opportunities offered by digital technology to keep pace with people's expectations and enabling them to explore the stories of Wales. The strategy also recognises that without an income-generating approach, these innovations will remain a difficult challenge in light of reduced public sector funding.

2.29   The £19 million investment across the Convergence funding area via the HTP is specifically referred to in the strategy's aim to 'maximise the impact and visibility of Wales's heritage icons' and highlights the role of headline sites such as Caernarfon Castle as strategic destination-level sites with 'pulling power'. At a more local level, the strategy also acknowledges the contribution of more modest historic assets, such as Oystermouth Castle, to the economy and as a focal point for community cultural activity.

Pan-Wales Interpretation Plans

2.30   Cadw has developed a pan-Wales interpretation approach aimed at interpreting the stories of Wales in a way which is accessible and inspirational to local people and visitors alike. Interpretation can include more 'traditional' approaches such as on-site information panels, maps, statues and sculptures and more 'modern' approaches, utilising technological advancements e.g. digital projections, games-based mobile phone apps, touchscreens and QR[23] codes.

2.31   The approach also aims to create both physical and thematic linkages between places and sites so that people can 'follow the story' across Wales and piece together the various strands to the history of Wales. By

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[23] Quick Response

packaging the various stories of Wales in a meaningful and attractive way the interpretation plans aims to:

- enhance local and national pride in our heritage assets;
- provide opportunities for people to learn something new;
- improve understanding and awareness of our rich stories;
- improve the visitor experience;
- positively reinforce Wales' image;
- make Wales more competitive within the global tourism market;
- increase appreciation of the historic environment and so contribute towards its conservation.'[24]

2.32 By improving the co-ordination and interpretation of Welsh history at historic sites, the plan aims to attract an increase in tourist visits from overseas, the UK and from local communities. In particular, the plan prioritises the need to make the interpretation relevant to the family market since this particular segment is thought to represent over 50 per cent of Cadw site visits.[25]

2.33 The Pan-Wales Heritage Interpretation Plan identifies the HTP as a key mechanism for delivering its aims and recognises that the project, provides Cadw with the necessary financial support to implement key interpretation and conservation initiatives, complementing funding from other grant providers such as the Heritage Lottery Fund:

'The success of the Heritage Tourism Project hinges upon an integrated presentation of sites and the development of meaningful and memorable storylines, making connections between sites, places, people and communities.'[26]

2.34 The plan outlines eight national/chronological and/or thematic story strands which were decided upon following consultation:

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[24] Visit Wales, 'The story so far…an overview of the Pan-Wales Heritage Interpretation Plan', p.5
[25] Ibid., p.7
[26] Ibid., p.8

- origins, prehistory and Roman invasion and settlement

- spiritual and inspirational landscapes – religious, spiritual and cultural inspiration from prehistory to the present day

- castles and princes of medieval Wales, including the native princes, Norman and Edwardian conquest, and the fight for Welsh independence

- the rise of the Welsh merchant and gentry, sixteenth to eighteenth centuries – the growth of towns, vernacular architecture and Welsh manors and towns

- Wales – the first industrial nation from the earliest times to the present day

- defence of the realm, from the Napoleonic Wars to the Cold War

- maritime Wales

- the rise of Wales and Welsh nationhood in the 20th and 21st centuries.[27]

2.35 These story strands are then divided further in order to create more detailed and practical thematic interpretation plans. To date, Cadw has commissioned a series of twelve thematic interpretation plans so that a set of storylines could be developed which would bring Welsh heritage interpretation alive in a consistent and integrated manner. These have included:

- Origins and Prehistory of Wales – from the first Neanderthal settlers to the eventual Roman occupation, covering 250,000 BC to AD 47.

- Roman Conquest, Occupation and Settlement of Wales - the Roman story throughout Wales AD 47-410.

- Celtic Saints, Spiritual Places and Pilgrimages – the story of Christianity in Wales from around 400 AD to 1100 AD, including the Age of the Saints (5th/6th centuries).

- Chapels, Churches and Monastic Landscapes of Wales - the history associated with Wales' Christian beliefs and practices of worship from 1100 AD onwards.

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[27] Ibid., p.9

- Princes of Gwynedd - the story of the Princes of Gwynedd and how this native dynasty rose to prominence in the late 13th century.

- Princes of Deheubarth – the rise and fall of the Princes of Deheubarth (c930 to 1287).

- Lords of the Southern March – the powerful Anglo-Norman Lords in Southern Wales, from 1066 - c1410.

- Castles of Edward I - the castles and town walls of Edward I covering the last quarter of the 13th century. It includes the castles at Caernarfon, Conwy, Beaumaris and Harlech which collectively hold World Heritage Site status.

- Owain Glyndŵr and his Uprising - Owain Glyndŵr, his life (c1359- c1416) and his leading role in the wars against English authority during the late 14th and early 15th century.

- Artistic Responses to the Landscape - how the landscape has provided inspiration to all sorts of artists over the last 300 years.

- Defence of the Realm (Pembrokeshire) - Pembrokeshire's role in defending Britain from war and invasion over the last 300 years.

- Wales: First industrial nation – the impact of industrialisation on Wales and the contribution that Welsh industry made on a global scale focusing primarily on the industrial revolution of the 18th and 19th centuries.[28]

2.36 Each thematic interpretation plan has its own dedicated icon (as shown in Figure 2.1) intended to help explain to the visitor how different sites related to each other while also suggesting other relevant sites for visitors to visit:

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[28] Adapted from http://cadw.gov.wales/interpretation/interpretationplans/?lang=en and the relevant sub-web pages for each thematic interpretation plan.

Figure 2.1: Thematic Interpretation Plan Icons

2.37   All HTP funded interpretation was required to adopt the pan-Wales approach as a condition of grant aid, and all Cadw stakeholders, from the public, private and voluntary sectors were encouraged to develop their interpretation content in line with the approach outlined. Branding guidelines and a practitioner guide have been developed by Cadw in addition to the thematic interpretation plans to provide all the necessary information and advice to key partners. It is not, however, the intention for thematic plans to replace the need for site-specific plans but rather to ensure that each site develops its story in a consistent way so that it fits within the broader context of the overarching story strand.

Conclusions from the Policy Review

2.38   Our desk based review suggests that the HTP was conceived and developed against a supportive Welsh policy context and was well rooted in and aligned with those key Welsh Government policies which were focused on both the Welsh historic environment and tourism sector.

2.39   During the course of the HTP's implementation, the Welsh policy context remained supportive of the underlying project objectives, with an increasing focus being placed upon widening access to and use of heritage sites both amongst local communities and visitors. Various policy documents have also highlighted the potential for the HTP project to

facilitate improved alignment between Cadw and Visit Wales in terms of strategic linkages and priorities. Strategic documents published during the course of the HTP's implementation phase (such as interpretation plans) have provided an additional level of detail which has helped inform the delivery of the project, in-line with its original objectives.

3. AIMS, OBJECTIVES AND RATIONALE

Introduction

3.1 This chapter is based on a literature review of project documentation and evidence gathered via the fieldwork undertaken. The chapter explores the original aims and objectives of the HTP and the need and underlying rationale for the project. The chapter also recounts some of the key stages of the project's development.

Aims and Objectives

3.2 The HTP project was developed with the twin aims of improving Welsh heritage destinations and producing visitor focused heritage interpretation at these sites. It formed one of a suite of strategic projects funded via Environment for Growth, Priority 4 Theme 3, of the 2007-2013 Convergence ERDF Programme.

3.3 The HTP project business plan set the objective of maximising the value of heritage to the Welsh economy by investing in a set of interventions that would increase the volume, length and value of visitation to Welsh heritage sites.

3.4 The underlying rationale for the project was based upon the need to address four key issues, namely that a large number of Welsh heritage sites were:
- inaccessible and needed to be improved in terms of their access, signposting and promotion
- reliant upon dated and non-engaging interpretation
- not adequately catering for the needs of family visitors
- not offering a particularly appealing visitor environment. [29]

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[29] Cadw, Heritage Tourism Project Business Plan Final Version, p. 4-5

3.5 A logic model for the project, developed as part of this evaluation to measure the outcomes and impacts achieved, is presented at Figure 3.1.

Figure 3.1: HTP Evaluation Logic Model
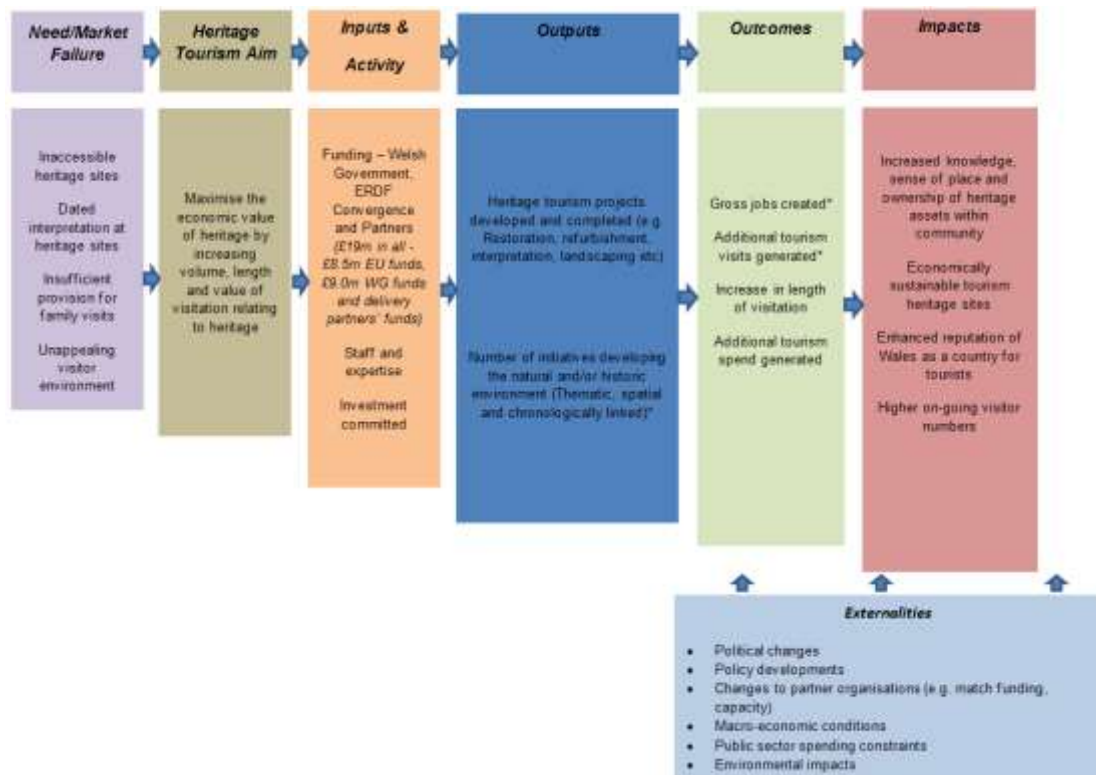
3.6 It was intended that the project would focus upon five key heritage themes, namely:
- Prehistoric origins and Roman invasion of settlement
- Spiritual and inspirational landscapes
- Castles and Princes of Wales (Princes of Gwynedd, Princes of Deheubarth, Owain Glyndwr, Edwardian Castles and Marcher Lords)
- Wales: the First Industrial Nation
- Defence of the Realm[30]

3.7 The HTP business plan also set out the intention to fund initiatives which were linked in some way, be that thematically, spatially or chronologically,

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[30] Ibid., p.5

in order to maximise the synergy of the project. The business plan went on to outline that the HTP project would be guided by a national heritage interpretation plan so that each theme could be presented and promoted on a pan-Wales, regional or local basis. It is worth noting that the five themes outlined in the business plan cover eleven of the twelve themes presented in Cadw's Thematic Interpretation Plan which was introduced at a later date.

3.8 The business plan states that the project would aim to stimulate demand whilst simultaneously investing in improving the supply side of the visitor economy in Wales, thus having the effect of key heritage sites being 'more intellectually accessible and more enjoyable to visit – for tourists and local residents.'[31]

3.9 In terms of target beneficiaries the business plan identifies a wide range of potential groups who would benefit from investments made by the project including:
- visitors (be those tourists or residents of Wales)
- businesses (who would benefit both from additional tourism spend as well as opportunities to directly supply some of the initiatives funded via the HTP project)
- potential 'individual' beneficiaries (unemployed or economically inactive individuals who might benefit from volunteering or work experience placements at HTP supported sites).

Project need and rationale

3.10 Most of the stakeholders interviewed as part of this evaluation were aware of, and understood, the overall aims and objectives of the HTP project. Stakeholders felt that one of the key project aims was the (demand side) objective of maximising the economic value of Welsh heritage site(s) by increasing visitor numbers, their dwell time and financial

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[31] Ibid., p.4

value of the visits. Several stakeholders saw the HTP project as a significant opportunity to invest in improving and modernising the visitor experience at heritage sites. In particular, stakeholders argued that the HTP project offered the chance to 'reinterpret how heritage was presented in Wales', updating it and presenting it in a more contemporary way.

3.11 Several stakeholders also argued that the HTP had a key role to play in helping to 'improve the understanding and interpretation of heritage themes' across Wales through the process of 'telling stories'. Other contributors were keen to focus on the fact that the HTP funding offered opportunities to conserve heritage sites and open up others to the general public and visitors alike. Additionally some contributors added that the project's intention had included the objective of raising the profile of 'hidden' Welsh heritage – not just focusing on those key sites which already experienced high visitor numbers.

3.12 A handful of contributors stated that the HTP offered an opportunity for Wales to present its heritage assets using Cadw's national interpretation strategy. These individuals praised Cadw's intentions in this respect adding that the HTP offered an opportunity to help realise an ambitious and innovative strategy.

3.13 By and large, contributors suggested that the investments made across individual initiatives had not only been in keeping with the overall aims and objectives of HTP but also with local policy objectives. Furthermore, some initiatives were considered to have greater potential to contribute to specific objectives – for instance it was suggested that the nature of investments at some sites had the potential to impact upon increasing visitor numbers whilst other types of investment were deemed to have more potential in improving the overall visitor experience.

3.14 Other initiatives were considered to have a greater focus upon the site restoration so as to enable it to be opened to the general public - one

initiative (E5) for instance had previously not been open to the general public although pre-arranged tours had been available on request and another two (E8 and E10) argued that their plans aimed to bring one heritage site 'back to life' and another to open up greater access to visitors given that both sites had fallen into a state of disrepair.

Project development

3.15   The business plan suggests that significant effort was deployed by Cadw to promote the project and the availability of HTP funding with the objective of securing wider interest amongst potential external partners. Indeed the business plan notes that Cadw was required to show 'that non-Cadw sites were an integral element of the project and would be treated equitably alongside schemes for Cadw-controlled sites.'[32]

3.16   A number of contributors emphasised that it had been important that the HTP was not restricted solely to Cadw run sites and that it had been strategically important that the funding would be made widely available to other applicant organisations. In this respect it was considered an important strength that the project had adopted an 'inclusive' approach to the selection of a wide range of initiatives across the Convergence area.

3.17   The downside of this approach was thought by some stakeholders, including some of those based at Cadw, to have been a risk that funding might have been spread 'too thinly' across a large number of sites. Interestingly some contributors involved with externally led initiatives (incorrectly) thought that non-Cadw initiatives had received a smaller share of the HTP funds overall which led them to take a view that 'there wasn't enough money to do something significant'.

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[32] Cadw, Heritage Tourism Project Business Plan Final Version, p. 8

3.18   A preliminary workshop was held in January 2008 to raise awareness of potential HTP funding followed by four regional workshops between April and May 2008. In addition, the Director of Cadw and the HTP Project Manager facilitated a number of bi-lateral follow up meetings with interested partners up until November 2008 and two further workshops were held in late 2008. Several representatives from externally funded initiatives spoke of having attended these briefing sessions and in a small number of cases (such as E9) the events had encouraged local authorities to consider a partnership approach to the application process. In two cases, (E9 and E13), a local authority commissioned a local heritage audit with the view of identifying and selecting the heritage sites which would form the basis of two separate HTP applications.

3.19   During the course of 2008, a dedicated project page was established on Cadw's website which included the option for potential partners to submit an initial project idea. Over 80 external project ideas were submitted to Cadw by the end of 2008 totalling over £70 million in cost - which was significantly greater than the £19 million available via the HTP project. Following on from this process, organisations were then invited to submit a formal tender to Cadw as part of a competitive tendering process deployed via Sell2Wales.

3.20   In the main, representatives from externally funded initiatives thought that the processes which had been deployed by Cadw to promote potential HTP funding opportunities had been appropriate and fit for purpose. Many spoke of having met Cadw officials at the point when HTP received funding approval from WEFO and believed that they had been adequately informed about the tendering process which followed.

3.21   Feedback on the tendering process adopted by Cadw to identify and select external initiatives was considered to be very positive overall, despite a couple of contributors taking the view that the process had taken longer than they had hoped. The main issue raised by these externally

funded initiatives and other contributors related to difficulties sourcing match funding (which was a required condition of awarding HTP funding), despite the availability of Targeted Match Funding (TMF). In the case of one external initiative for instance (E2) it was explained that Cadw had given them the opportunity to scale down the proposed initiative, as opposed to withdrawing completely, when it emerged that an adequate level of match funding could not be sourced. Several contributors also referred to other possible external initiatives which had shown an interest in HTP (as well as individual potential partners within funded initiatives e.g. in the case of Cardigan Castle within the Princes of Deheubarth[33] initiative) who had to withdraw from the application process due to not having sufficient match funding in place.

3.22   Despite only being able to award funding to those external initiatives which had already secured match funding commitments, stakeholders felt that externally funded initiatives had still been well aligned with, and offered strong potential to contribute towards, the underlying objectives of the HTP. Indeed only a couple of contributors suggested that the selection of external heritage sites, and in particular the nature of investments made within them, had been influenced by what provisions would be eligible for EU funding, as opposed to what needed to be prioritised. Even so, it was suggested that it had been appropriate that significant consideration had also been given during the tendering process to the number of additional visitors and anticipated direct and indirect jobs created targets, which would be expected to be achieved by external initiatives – although (and as is discussed later) the requirements for funded initiatives to report upon these was relaxed over time and were therefore not aggregated to reflect the full achievements of the HTP.

3.23   Most contributors from external initiatives interviewed as part of the evaluation (13 of the 14) said that their proposals had been approved by

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[33] The Princes of Deheubarth and Lords of the Southern Marches initiative included investments at Carmarthen castle, Carreg Cennen castle, Dinefwr castle and park, Pembroke castle and Swansea castle.

Cadw without any significant changes. In the one case where there had been a significant change to the plans submitted, this had been the result of proposed activity being deemed ineligible.

3.24   Turning to explore the selection of Cadw initiatives, feedback from Cadw officials and a review of documentation suggests that these sites were essentially determined by Cadw staff (via the project board) and members of the steering group which had been put in place at the outset. Several contributors took the view that the selection criteria adopted had been rigorous and had taken into consideration a range of factors including the requirement for sites to be based within the Convergence area, the potential scope for development at each site in order to increase the number, duration and value of the visitation as well as a desire to support a cross-section of Cadw heritage sites in terms of their scale (in terms of the level of income they generated and the number of annual visitors they generated). One contributor also suggested that it had been important to include sites which had World Heritage status[34] in order to secure the on-going status of such sites.

3.25   A review of project documentation shows that the final selection of Cadw heritage sites and the proposed developments differed slightly from the original list identified within the project business plan. Cadw officials suggested that these changes had come about largely in response to opportunities arising over the course of the project. For instance, one of the Cadw owned heritage sites – Caerphilly castle - was introduced at a later date and some significant changes to the objectives at Harlech castle were made in response to the opportunities posed by the sale of a local hotel and the possible threat of losing vehicular access to the site. In our view the flexibility and creative thinking adopted by Cadw to respond to these emerging opportunities was a strength of the approach adopted,

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[34] Three of the 11 Cadw funded initiatives are awarded UNESCO's World Heritage status, namely three of the four castles (Caernarfon, Harlech and Conwy) which form the Castles and Town Walls of King Edward in Gwynedd. In addition, two of the externally led initiatives - Blaenavon Industrial Landscape and the Pontcysyllte Adqeduct and Canal are also awarded World Heritage status.

particularly in light of the fact that they had been unforeseen at the outset of the project.

4.   PROJECT DELIVERABLES AND PERFORMANCE

Introduction

4.1 This chapter considers the extent to which the HTP achieved its key performance indicators and the performance of individual initiatives against their funded targets. It also presents an overview of the main deliverables achieved.

Key Performance Indicators

4.2 The HTP business plan states that the project would achieve the following six key performance indicators:

- improved interpretation and access at a minimum of 25 sites
- a minimum of 15 tourism product packages for five heritages themes and six spatial areas to promote cultural and heritage tourism
- generate 210,000 additional tourism visits
- creation of 238 jobs (18 of these being direct jobs and a further 220 being indirect jobs through visitor spending)
- 250 participants engaged in specialist coaching and mentoring events and activities
- 200 participants completing coaching and mentoring courses.[35]

4.3 Three of these key performance indicators were removed and another two revised either over the course of the project's application process or during the delivery period. It was agreed that it would not be realistic for the project to report upon any provision for participants given that there would be no coaching or mentoring provision for participants made available. It was also agreed[36] that the target relating to the creation of 15 tourism packages would be removed and a more appropriate indicator, namely 'initiatives developing the natural and/or historic environment' be used

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[35] Cadw, Heritage Tourism Project Business Plan Final Version, p.5-6
[36] During a review meeting in June 2010

instead and effectively cover two of the original indicators. Whilst the original target was set at 18 it was later increased to 25 during March 2014.

4.4 It was also agreed that it would not be feasible for the project to report upon additional tourist visits to the funded sites concerned, largely due to difficulties attributing any increases in visitor numbers to the investment made but also due to the fact that visitor numbers are influenced by a number of external factors including weather and economic climate. Rather it was agreed that the project would report upon all tourism visits (rather than additional visits) across funded sites. It was also agreed at a later date (during 2014) that the target for the number of jobs to be created would be substantially reduced and that the project would only be required to report upon a small number of jobs directly created by the project. This target was reduced given the difficulties experienced in creating posts at a time of recession as well as greater use of volunteer time than originally anticipated.

4.5 Therefore the final three key performance indicators agreed with WEFO were:
- 25 initiatives developing the natural and/or historic environment
- generating 809,262 visitor visits across funded sites
- creating 8.8 direct jobs.

4.6 Output data made available to the evaluation team at the close of the project shows that the HTP met two of its three performance indicators. Several contributors praised the project for its success in meeting the visitor target and WEFO officials also commented positively upon the quality of quarterly reports provided by Cadw. Figure 4.1 provides an overview of the project targets and achievements.

Figure 4.1: Final project targets and achievements

Target	Achievement
25 initiatives developing the natural and/or historic environment	The following 25 initiatives received investment to improve interpretation and access: Cadw led initiatives 1. Anglesey prehistoric monuments 2. Blaenavon Ironworks 3. Caernarfon Castle 4. Caerphilly Castle 5. Conwy Castle 6. Denbigh Castle 7. Dyfi Furnace 8. Harlech Castle 9. Segontium Roman Fort 10. St Davids Bishop's Palace 11. Strata Florida Abbey Externally led initiatives 1. Calch 2. Carew Castle 3. Castell Henllys 4. Ceredigion Heritage Churches 5. Chapel Bay Fort 6. Denbigh Town Castle Link 7. Hafod Morfa Copperworks 8. Mona Antiqua 9. Our Heritage 10. Oystermouth Castle 11. Pontcysyllte Aqueduct and Canal World Heritage Site 12. Princes of Deheubarth 13. Princes of Gwynedd 14. Romans in Carmarthenshire
Generate 809,262 visitor visits across funded sites	The project reported that the target of 809,262 visitors was met exactly. Despite having achieved more, WEFO's online reporting system did not allow the project to report targets which exceeded the quota set.
Creation of 8.8 direct jobs	A total of 5.4 FTE jobs were achieved – a 0.7 FTE post was created at Oystermouth Castle and the remaining 4.7 FTE posts were created within the Cadw team. The posts were Head of Cadw Marketing and Business Development, Head of Life long Learning, Public Engagement/Welsh Language Manager and Education Manager (North Wales).

4.7 Figure 4.2 shows that the first funded initiative was completed during 2011, two years after the HTP project first commenced whilst over half of the initiatives funded were completed during the final year of the project in 2015.

Figure 4.2 Initiatives developing the natural and/or historic environment by year delivered

Year[37]	No. of initiatives delivered (number)	Percentage of total initiatives delivered (per cent)
2011	1	4
2012	3	12
2013	3	12
2014	5	20
2015	13	52

4.8 Project level monitoring data made available by Cadw allows for the initiatives funded and visits generated to be broken down by local authority areas. Figure 4.3 presents this data and shows that the initiatives funded have been dispersed well across 11 of 15 possible Convergence local authority areas, with the counties of Gwynedd and Pembrokeshire benefiting from four funded initiatives each. However when exploring the number of visits recorded against the target of 809,262 it is interesting to observe that the majority of visits (at 65 per cent) reported by the project were recorded in the Conwy local authority area – despite this authority only accounting for two of the funded initiatives. In contrast, no visits were reported across Carmarthenshire despite three initiatives having been funded in this area. The main reason for this is that visitor figures were only reported for a total of 13 initiatives, and that data from only three of the 14 externally led projects have been considered within the outputs reported by Cadw for the project overall, in light of the fact that no further outputs could be reported via WEFO's on-line system once the overall target had been achieved. This suggests that a significant number of visitors using the heritage sites following HTP investment were not reported to WEFO and that the achievements of the project have therefore been substantially under-reported.

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[37] Years 1 and 5 of the project (2011 and 2015 respectively) consisted of only two claim periods.

Figure 4.3: Initiatives developing the natural and/or historic environment by Local Authority area

Local Authority	No. of HTP initiatives within area	Visits Recorded
Caerphilly	1	121,992
Carmarthenshire	3	0
Ceredigion	3	20,139
Conwy	2	526,703
Denbighshire	3	34,435
Gwynedd	4	2,338
Isle of Anglesey	2	10,188
Pembrokeshire	4	47,604
Swansea	2	36,340
Torfaen	1	9,523
TOTAL	**25**	**809,262**

Source: Cadw[38]

4.9 In addition to these project targets, the business plan also stated that the project would provide 'an enduring legacy for future heritage tourism … in Wales'.[39] These other outputs were expected to include:

- changed attitudes of communities to the heritage assets around them

- changed attitudes and improved economic engagement of economically inactive individuals that benefit from participation in project activities

- improvements in the skill levels of those who engage in initiatives, in order to secure employment

- opportunities for unemployed individuals to gain work experience, training and/or volunteering opportunities.

The extent to which these other outputs were achieved is discussed in Chapter 8.

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[38] The number of visitors recorded draws in the main upon the number of fee paying admissions at each site but also includes the number of visitors recorded at specific events e.g. launch events.
[39] Cadw, Heritage Tourism Project Final Business Plan, p. 22

4.10   Our evaluation fieldwork revealed that Cadw and WEFO contributors thought that the HTP had performed well against its funded targets –most representatives from externally funded initiatives felt unable to comment on the performance of the project overall. Some of the developments funded were considered to be 'phenomenal', 'creative' and a 'flagship project' and one contributor added that 'I think it's been a really powerful and important project'.

4.11   Whilst some contributors felt that the project's delivery had been hampered by administrative and process related issues, they believed that these were outweighed by the successes of the HTP. This sense of pride in what had been achieved was particularly evident amongst a number of externally led initiatives who conveyed a real sense of achievement about the transformation which had taken place at their heritage sites. It was often the case that volunteers who had been involved with these initiatives had been 'very pleased and proud' of what had been achieved.

Performance of funded initiatives

4.12   Each externally funded initiative identified clear objectives, outputs, deliverables and outcomes for its proposed development as part of the application stage. A review of funding award letters issued by Cadw during 2012 and 2013 to these initiatives shows that the collective targets for the 14 externally led initiatives were 139,255 additional tourism visits annually on completion of the improvement works, together with the creation of 3.6 direct FTE jobs and some 16 initiatives developing the natural and/or historic environment, as presented in Figure 4.4:

Figure 4.4: Collective and individual targets set for externally led initiatives

	Additional tourism visits annually on completion of works	Additional tourism visits up to 31st December 2014	Direct FTE jobs created	Indirect FTE jobs created	No. of initiatives developing the natural and/or historic environment
Calch	4,500	4,500	0	0	0
Carew Castle	10,000	10,000	0	8.00	0
Castell Henllys	5,000	0	0	0	0
Ceredigion Heritage Churches	3,700	5,630	0	2.90	11
Chapel Bay Fort	5,555	0	0	2.50	0
Denbigh Town Castle Link	0	3,800	0	3.00	0
Hafod Morfa Copperworks	12,000	12,000	0	9.00	0
Mona Antiqua	Not specified	12,000	1.0	11.30	0
Our Heritage	35,350	70,950	0	24.00	0
Oystermouth Castle	20,000	42,000	0.6	17.05	0
Pontcysyllte Aquaduct and Canal WHS & Horseshoe Falls	0	3,250	0	2.50	0
Princes of Deheubarth, Lords of the Southern March	32,000	53,000	0	14.0	5
Princes of Gwynedd	7,750	6,000	2.0	5.00	0
Romans in Carmarthenshire	3,400	3,990	0	3.00	0
TOTAL	**139,255**	**227,120**	**3.6**	**102.25**	**16**

Source: Cadw

4.13 In the absence of robust monitoring data (given the relaxation awarded to external initiatives in terms of reporting upon visitor and jobs data) and

with the lack of final project closure reports for all initiatives it is very difficult to come to a conclusive view as to whether these initiatives met their funded targets or not.

4.14　However it is possible to make some observations for six of these externally funded initiatives given that independent evaluations were undertaken for two (Our Heritage and Princes of Deheubarth[40]); final project closure reports were prepared for another two (Ceredigion Churches and Hafod Morfa Copperworks) and visitor data was included in Cadw's final claim to WEFO for another two (Oystermouth Castle and Mona Antiqua). The visitor related outputs for five of these six initiatives are presented in Figure 4.5 and show that whilst a significant number of additional tourism visits had been experienced, none of the initiatives had managed to fully achieve their funded target by the end of December 2014.

Figure 4.5: Achievements of initiative level targets

	Additional tourism visits annually on completion of works		Additional tourism visits up to 31st December 2014	
	Target	Achieved	Target	Achieved
Ceredigion Heritage Churches	3,700	n/a	5,630	2,792
Hafod Morfa Copperworks	12,000	n/a	12,000	7,128
Mona Antiqua	0	5,672[41]	12,000	9,838
Our Heritage	35,350	n/a	70,950	58,833
Oystermouth Castle	20,000	n/a	42,000	29,212
Total	71,050	n/a	142,580	107,803

Source: various project closure reports, independent evaluations and Cadw monitoring data

4.15　Several factors need to be considered to explain this general under-performance – the most critical being delays in commencing project

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[40] Although the evaluation of the Princes of Deheubarth provides no insight into the success or otherwise of the initiative in achieving its funded targets or any information on outputs achieved.
[41] 2013 Visitor Numbers having completed the visitor centre element of the project in 2012

delivery at both the Ceredigion Heritage Churches and Our Heritage, which impacted upon their ability to meet the target within the original timescales set. These delays also account for the unavailable outputs (other than for Mona Antiqua) to report against their target of 'additional tourism visits annually on completion of works' given that the projects were only completed within the last year. So whilst the evaluation report for the Our Heritage initiative presents the number of tourism visits expected annually on completion of the works, the data is an estimation. This was the case for several initiatives, which completed work towards the end of the project lifetime, and thus had no opportunity to record the number of annual tourism visits post completion of works. The only exception to this was the Copper Bins Centre at Amlwch Port which completed in 2012, and recorded 5,672 visits in 2013[42].

4.16   Over the course of our fieldwork, externally funded initiatives were upbeat in their view that their initiatives had achieved what they set out to achieve. Indeed across all of the visits made it was evident that the capital investments had been realised and achieved, despite having faced various delivery challenges. In particular external initiatives reinforced the point that initial delays in getting their project off the ground had often made it difficult to report changes to visitor numbers within the project's funding period, particularly where the investment had only been completed over the 2015 peak tourism season.

4.17   Our fieldwork revealed that representatives from across the 14 externally led initiatives were aware that they had agreed to a number of funded KPIs, such as additional tourism visits as part of their application process. In some cases (E3, E9) these targets were considered to have been overly optimistic and were subsequently scaled down part way through. Other externally led initiatives believed that the targets set in terms of additional tourist visits had been significantly too low – for instance in two cases (E6, E8) it was anticipated that some 3,800 and

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[42] Source: Cadw monitoring data

3,250 additional visits respectively would be generated over the course of the HTP, whereby in fact the actual increases were much greater e.g. 16,000 additional visits at one site which had experienced an increase from 14,000 to some 30,000 following some major developments to the site's car park and access routes.

4.18 Turning to discuss the performance of Cadw led initiatives, the original business case for one initiative (relating to Blaenavon Ironworks) which was shared with the evaluation team suggests that targets for additional visitors would also have been agreed for internally led initiatives[43]. In the case of the Blaenavon Ironworks initiative it was expected that some 15,000 additional visitors per annum would be achieved. Despite the fact that original KPIs for the other internally led initiatives could not be made available to the evaluation team there was a common assumption amongst Cadw contributors that these sites would collectively contribute towards the overall project level indicators set. It is impossible to come to a view about the success or otherwise of these initiatives in meeting any original targets relating to visitor numbers – other than possibly in the case of Blaenavon where 9,523 visitors would have been reported as having visited the site over the course of a four month period between March to June 2015. Despite this, contributors argued that all internally led initiatives had achieved what had been agreed and could point to marked transformation of particular heritage sites in terms of restoration, interpretation and improved access.

Nature of developments funded

4.19 The nature of the investments made across the 25 supported initiatives were considered to have ranged from fairly modest developments to some transformational changes. The range of investments supported are outlined in Figure 4.6:

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[43] However copies of business cases for the other internally led initiatives were not available for sharing with the evaluation team.

Figure 4.6: Nature of HTP investment across supported initiatives

- Improved visitor access – including extending car parking facilities, resurfacing car parks and improved foot access to site.
- General groundwork and clearing of open spaces.
- Erection of a new visitor centre.
- Improvements or extension to existing visitor centre.
- Improvements or provision of new toilet facilities.
- The opening of a new heritage tourism attraction that was previously not available to visitors.
- Enabled access to parts of the site which were previously not open to the public.
- Creation of events spaces.
- Provision of an events programme.
- Provision of children's activities including children's trails and quests.
- Provision of novel and unique ideas such as a map of Wales and chess pieces.
- Improved interpretation exhibition including exhibition panels.
- Provision of digital interactive exhibitions and film footage.
- Development of phone apps.
- Website development.
- Promotional materials including better signposting (e.g. on major roads) and promotional leaflets.

5.   HTP IMPLEMENTATION

Introduction

5.1 In this chapter, we discuss the implementation of the HTP. The chapter covers the implementation model deployed for delivering the project, and analyses the views of contributors in relation to this model. It also considers project management and administrative arrangements, explores project level relationships and communications and presents the findings of our fieldwork on individual initiative implementation whilst taking into consideration some of the external factors which may have influenced their delivery. Finally in this chapter, we consider individual initiative procurement issues and marketing arrangements.

The Implementation Model

5.2 The HTP was managed by Cadw, the Welsh Government's historic environment service, from its headquarters in Nantgarw. Given that Cadw is responsible for a large number of publicly accessible heritage sites in Wales most contributors to the evaluation agreed that it had been a logical decision for it to have taken the role of lead sponsor.

5.3 A project steering group was established during the project's development phase with a remit to provide overall direction for the project, to oversee the selection of initiatives to be funded by the project and to function as a conduit between Cadw and external stakeholders. In addition to the steering group, a project selection board was also established, chaired by Cadw's Senior Procurement Manager, to oversee the procurement and selection of project contractors. This selection board operated independently of the steering group.

5.4 The business plan stated that the project steering group would ensure that 'an equitable geographic spread of projects throughout the Convergence

Area' would be achieved and that the initiatives selected would 'either create new clusters of sites which capture visitor interest or enhance existing clusters.'[44] The steering group was chaired by the Cadw Director and members were drawn from a range of organisations including Visit Wales, National Museum Wales, Regional Tourism Partnerships, CyMAL, Welsh Local Government Association and the Wales Council for Voluntary Action.

5.5 Feedback from Cadw representatives suggested that the project steering group had played a useful role, particularly at the outset of the project to oversee the work of the project selection process and to provide an overall strategic direction for HTP. After this initial focus, however, some stakeholders argued that there was less of a need for the project steering group during the implementation phase and a decision was taken not to convene further meetings.

5.6 Cadw was also represented on the E4G steering group and those involved reported that this had helped facilitate a good level of collaboration between the various E4G projects.

5.7 An internal project board was also established within Cadw to provide strategic direction for Cadw's own funded HTP projects and to monitor overall project progress against key milestones and objectives. This project board continued to meet on a monthly basis over the course of implementation and was considered by Cadw staff to have undertaken an efficient role in monitoring the progress of works on site. We take the view that it had been appropriate for the operational delivery of the project to have been managed by a project board but think that the lack of an ongoing steering group (which could have met on an infrequent basis) was a missed opportunity, particularly in terms of being able to draw upon the input and advice of external organisations on issues such as project monitoring and securing linkages between individual initiatives.

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[44] Cadw, Heritage Tourism Project Business Plan Final Version, p.27

5.8 In terms of project staffing it was intended that a team of six Cadw officials would form the core project team, comprising:

- Project Co-ordinator (reporting to the Director of Cadw)

- Project Officer (reporting to the Project Co-ordinator)

- Finance Officer (reporting to the Project Co-ordinator)

- Procurement Officer (0.75 FTE) (reporting to the Senior Procurement Manager)

- Senior Procurement Manager (0.25 FTE), and a

- Administrative Support Officer (0.5 FTE).

5.9 In addition, it was expected that Cadw officials would oversee the implementation of its own HTP funded projects and that associated costs would be reimbursed by the project and evidenced via the use of timesheets.

5.10 According to the business plan it was intended that the project would be delivered across at least eight local authority areas (namely Anglesey, Gwynedd, Conwy, Denbighshire, Ceredigion, Carmarthenshire, Pembrokeshire and Swansea Bay) on the basis that initiatives from these authority areas were identified and proposed within the business plan.

5.11 In all, 25 initiatives were approved under the HTP; 11 of these were delivered directly by Cadw and 14 were led by external partners. Of the initiatives led by external partners, the majority were led by local authorities (nine), while one was delivered by a university, two by trusts, one by a charity and one by a social enterprise.

Views on the implementation model

5.12 We sought the views of stakeholders about the HTP implementation model, specifically whether it had been appropriate for the project to have funded such a large number of initiatives led by so many different

organisations. Contributors held very mixed views about this issue – many argued that it had been a strength of the model adopted that it had offered funding opportunities to a large number of diverse sites whilst others argued that the project could have benefited from adopting a 'more simplified approach', with fewer initiatives receiving larger amounts of funding. These stakeholders argued that this approach may have led to a greater transformation of particular heritage sites.

5.13   Another key issue raised in particular by Cadw representatives related to the delivery timescale adopted for HTP, which were considered to have been 'tight' despite a delivery period of six years. This view was influenced by the fact that the project had been required to stagger the timing of delivering internally funded initiatives in order to work within the staffing capacity available (and to accommodate the management of externally led initiatives). It was also influenced by a view amongst some contributors that the project had supported a number of initiatives that were not particularly 'start-ready' at the time and had faced significant lead-in times and delays in their implementation – indeed one initiative had to be excluded from the project due to delays experienced at the site concerned.

Project management

5.14   In terms of project management, it was widely acknowledged that the project had been under-resourced in terms of staffing capacity, particularly within Cadw's core management team, but also across externally funded initiatives. Indeed there was a general view that all those involved in the delivery of HTP had under-estimated the amount of staffing time required to manage and administer the project and its respective initiatives.

5.15   As a result it was argued that Cadw core staff in particular had been required to assume responsibility for overseeing the delivery of internal HTP initiatives as well as the functions of their 'usual day jobs'. Some stakeholders argued that this meant staff were often over-stretched.

Contributors were fairly unanimous that the project would have benefited from having a larger dedicated team of staff in place at Cadw with dual responsibility for managing the project's administration as well as taking responsibility for overseeing the delivery of Cadw led initiatives.

5.16   Mixed views were conveyed by externally funded initiatives about Cadw's management of the project. A few externally led initiatives took the view that Cadw's project management role had been focused on regulatory compliance and financial monitoring and auditing, as opposed to a wider definition of the role expected as project manager. Other initiatives were satisfied with the project management role undertaken by Cadw adding that they had received all the support that they had required and requested.

5.17   Representatives from externally funded initiatives gave the impression that the level of contact between Cadw's management team and themselves had varied over the course of the project, which possibly explains the varied satisfaction levels. A small number of externally led initiatives (primarily the larger ones) reported that they had been very satisfied with the relationship and level of communication that had been in place between themselves and Cadw officers. For instance one initiative spoke of having had regular meetings with Cadw's project manager. Others expressed their disappointment at the lack of review meetings with Cadw officials. In one such case, contributors had been disappointed that Cadw project staff had only visited their heritage site on one occasion over the course of the HTP whilst another noted that Cadw staff had never attended any of their board or steering group meetings. Others mentioned that they had had no contact with Cadw officers 'for a long, long time' following the initial approval leading them to believe that the project team had been focused on internally led projects.

5.18   With the benefit of hindsight, it was acknowledged by both external initiatives as well as some Cadw staff that a greater level of support could have been provided to externally funded initiatives, albeit that the limited

staffing resources available within the management team had restricted them from meeting this need at the time. In the absence of such support a few externally led initiatives noted that they had turned to other organisations, notably local authorities, for support and guidance, particularly in relation to EU funding matters.

Project reporting and monitoring

5.19   Several external initiatives suggested that the monitoring and reporting requirements for the project had been onerous. Furthermore they also took the view that they had experienced a substantial increase in the amount of information requested by Cadw from the mid-point of delivery onwards. Many of the concerns expressed by externally funded initiatives were acknowledged by Cadw contributors who argued that there had been a general under-estimation of the reporting requirements at the outset of HTP as a result of the project being funded by European monies. Cadw officials said that WEFO's reporting requirements had increased substantially part-way through delivery and that they had no choice other than to pass these additional requirements on to external initiatives. According to one such contributor:

> *'As the project has gone through its timeline the level of scrutiny increased and therefore the audit requirements increased. Procedures which met the appropriate standards at the beginning didn't necessarily meet the appropriate standards at the end of the project. This has meant that it's been quite difficult to find the information that the auditors now need.'*

5.20   As a result one of the main reporting challenges for externally funded initiatives was considered to have been the need to provide retrospective evidence for some elements of expenditure, particularly in those cases where staff changes had occurred.

5.21 Indeed even those initiatives that had previous experience of delivering EU funded provision, particularly local authorities, argued that their experience of HTP had been much more challenging and onerous by comparison. Furthermore they would have welcomed a much more structured manner of receiving queries and requests, as opposed to the perceived 'drip by drip' approach adopted, and a reduction in the requests to re-submit paperwork which had already been submitted by their organisation. In their defence, Cadw officials argued that they had approached external initiatives as and when it became evident that further information was required of them with the intention to give initiatives as much advance notice as possible.

5.22 Not being able to comply with the project's reporting requirements had been a matter of significant concern to a handful of representatives from externally funded initiatives in that they were mindful that EU funding would be irrecoverable unless they had done so. They noted that:

'We received a constant stream of requests ... all made with implied threats [that we would lose out on funding]'.

In another case this issue had led to:

'huge concerns for our Trustees ... we all lost a lot of sleep over it [the project].'

5.23 Initiatives run by small organisations were thought to have struggled the most in meeting WEFO's reporting and financial monitoring requirements. Consequently, some contributors questioned whether it would have been better for the HTP to have been either delivered entirely by Cadw or alternatively, whether it would have been more appropriate for larger organisations, such as local authorities, to have managed the funding on behalf of smaller organisations. This was considered to have worked well in the case of one external initiative where the small charity, which had been involved in the delivery of an initiative managed on their

behalf by their local authority, felt that they had been largely shielded from the monitoring and auditing information necessary to meet WEFO requirements.

5.24   Some externally led initiatives had not anticipated the significant amount of work required of them in order to meet project closure requirements. In one case for instance, an external lead partner conveyed their frustration that they had been required to allocate significant staff resources to deal with queries for up to a year after the initiative had been completed (despite of course having accepted a contract to meet European funded audit requirements up to 2024). In another, initiative staff claimed that they had only been made aware of the need to conduct a final initiative level evaluation very late in the day, and had not budgeted accordingly. Such feedback suggests that external initiatives would have benefited from better and more timely communication in terms of the final monitoring and evaluation requirements that WEFO expected.

Relationships and communication between initiatives

5.25   One strength of the HTP project was considered by both Cadw officials and externally funded initiatives to have been the way it encouraged and enabled partners to collaborate on the delivery of particular initiatives. In many cases organisations leading external initiatives suggested that the initiative had enabled them to formalise and strengthen relationships and partnerships with other organisations that were known to them but with whom they had had only limited prior contact. In one case for instance a local authority had unsuccessfully attempted to work with a local land estate for a number of years to allow greater access for tourists but found that the 'project [HTP] has opened that door' and it was hoped that the excellent partnership working which had been formed would continue in the future. In the same manner at another initiative a successful partnership was established between a local authority and a university and was described as *a good, strong partnership … quite a unique one'*.

In another case, a successful partnership of nine organisations was established to jointly deliver their HTP initiative and this partnership had remained in place after funding had come to an end.

5.26　The level of contact and communication between funded initiatives on the other hand was generally considered to have been weak, even non-existent in many cases. It was clear that some contributors felt this had been a missed opportunity, particularly in terms of being able to develop and strengthen the linkages between heritage sites on a thematic basis. Many initiatives would have welcomed an initial project networking or a facilitated joint briefing event whilst others would have welcomed an end of project event to reflect on good practice and lessons learned. Indeed a representative from one externally led initiative commented:

> *'We never knew who the other projects were! We would have linked informally with [name of initiative focused on similar theme] had we known.'*

Furthermore, it was suggested that it had been a missed opportunity not to have developed a pan-HTP website to promote the sites involved and promote on-line dialogue between initiatives where appropriate.

Individual initiative implementation

5.27　In at least six cases (E1,E3,E4,E7,E8 and E10) formal steering groups, occasionally referred to as project boards, were established to oversee the delivery of externally led initiatives. These groups were considered by externally led organisations to have worked effectively in most cases. They had been attended by representatives from a range of organisations and their contributions were considered to have been invaluable to project managers. In at least seven cases (E3,E4,E7,E8,E9,E10 and E12) operational management groups were established and met on a regular basis over the course of delivering each initiative – in three cases (E8,E10

and E12) the management group was attended by a Cadw representative and in at least two cases (E3 and E7) by a contractor.

5.28   The main difficulties experienced by at least two externally led initiatives (related to having a management or steering group which was attended by too many contributors, largely the result of having involved so many partners. One such contributor added 'at the start there were too many [partners], everyone brought too many partners to the table'. In such circumstances it was felt that decision making processes took too long and that the management approach adopted had been one driven too much 'by committee'. In the other case, the situation had been exacerbated due to the introduction of sub-groups which was considered by those involved to have only served to complicate the decision making process even further. Representatives from this particular initiative questioned for instance whether it had been appropriate for all nine initiative partners to have had their opportunity to comment and approve the content for interpretation panels which were commissioned, as this led to significant delays in getting them ready. A key lesson observed across both of these initiatives was the need for a smaller and more strategic group to oversee the delivery of the initiative and to be tasked with decision making.

5.29   One of the common initiative level implementation issues raised over the course of the fieldwork related to delays in getting developments underway. A number of factors were considered to have had a bearing upon such delays including the initiative not being given a high enough priority by the lead partner (particularly if one organisation had been involved in two or more initiatives and had been required to work on the other first) and where an organisation took a conscious decision to stagger the development in a sequential manner in order to reduce the financial risk for the lead organisation. In one such case the lead organisation was concerned that any over-spending on initial developments ought to be absorbed within the final elements of development in order to keep within the agreed budget. Delays were considered to have had a bearing upon the timing of construction work at a few sites, with one case reporting that

the construction work had to take place over the peak summer tourism season as a result.

5.30   Aligned to this point, representatives from a couple of external initiatives highlighted that they had been required to take financial risks when implementing their developments, not least because of concerns that costs might not be reimbursed by Cadw and WEFO – and this approach had not always been well received by their Directors or Trustees. In one case in particular the financial risks for a small charity in taking on such a large scale project had been of a major concern to its Trustees which led them to conclude that, despite the initiative having been a success, they had not been the most appropriate organisation to take on the financial responsibility for the initiative and that it would have been more appropriate for the local authority to have operated as the lead partner – particularly given how supportive they had been throughout.

5.31   At least three externally led initiatives also expressed their concerns about the late payment of invoices submitted to Cadw although Cadw officials reported that such payment delays had often been associated with the lack of sufficient evidence or information to support a claim. Several issues had arisen as a result for some externally led initiatives – for instance in one case, an organisation had been required to take out a bank loan in order to fund the short term deficit created and in another case a charitable trust would have faced bankruptcy had the lead organisation not made available bridging funding whilst they awaited payment.

5.32   Another implementation issue raised by several externally led initiatives was that they had under-estimated the resources required of them to administer the project (largely considered to be the result of greater than anticipated reporting demands placed upon them). As a result, several initiatives reported that they had had to allocate greater project resources as well as volunteer time to project administration than planned. This led them to question whether the balance between resources spent on project

administration on the one hand and the actual financial investment made within the heritage site concerned had actually been disproportionate.

5.33 A few of the externally funded initiatives also reported that they had faced some issues in terms of managing their contractors and securing the required level of quality within agreed timescales and budget. A couple of external initiatives reported that they had been dissatisfied with their appointed interpretation contractor in that whilst they had excellent visual design skills they lacked the necessary skills to prepare the content of interpretation panels.

5.34 Cadw representatives pointed to staff turnover within externally led initiatives as having been a common issue, and indeed representatives from at least two initiatives acknowledged that the loss of knowledge due to staff leaving had created significant issues for them when dealing with audit and monitoring requirements.

5.35 In terms of internally led Cadw projects, the main challenges were considered to have been practical, construction related issues as well as delays resulting from issues such as archaeological findings – for instance in the case of Harlech castle a burial site was discovered part way through the development. This discovery resulted in the archaeological work at Harlech castle taking much longer than anticipated which led to an increase in the overall costs (circa £122,000) and a significant delay in the completion of the works.

Influence of external factors

5.36 A number of external factors were considered to have had bearing upon the delivery of individual initiatives over the course of delivery. The most commonly cited issue related to difficulties in securing planning consent, which was frequently considered to have been a long and difficult process in light of the fact that the sites being developed, as listed buildings and located in conservation areas, were subject to stringent

planning regulations. A few of these external initiatives noted that having to wait for scheduled monument planning consent had led to delays in the delivery of their plans.

5.37   Other specific restrictions were also cited by contributors who had been involved with externally funded initiatives, including the need to undertake ecological surveys (in the case of E2 and E3) and a river survey in the case of another (E3).

5.38   Others referred to tensions within their own organisation or between local organisations involved with the initiative as having been a key obstacle to the implementation of their plans. It was clear for instance that in one case representatives from within one organisation had very different visions for how the site in question should develop – with some favouring developing the site as a centre of excellence whilst others favoured the development of tourism related functions. As this project team had wanted to secure a consensual view before progressing with the works, the consultation process which ensued led to significant delays for the initiative.

Individual initiative procurement

5.39   Many of the stakeholders interviewed as part of the evaluation felt that procuring services and contractors to undertake work on heritage sites had been complex and very difficult to plan and budget for. The views of one contributor echoed the sentiments of many others when they stated that: 'heritage projects are just not straightforward … they don't fit well into the rules … you just can't cost them in advance, there's nothing standard about repairing a medieval castle'. Nowhere was this clearer than in the case of Cadw's Harlech castle initiative where the uncovering of a burial site led to a six month delay and significant unanticipated additional costs which had to be absorbed prior to the initiative being taken forward.

5.40   A number of externally led initiatives said that they would have welcomed clearer guidance from Cadw, as well as WEFO, on the procurement of contractors despite procurement regulations having been set out as part of their grant offer letters. Indeed representatives from externally led initiatives argued that the guidance made available had been 'inadequate' and 'unclear' and that the level of evidence required of them had increased over the course of the project. More detailed procurement guidance from the outset, it was argued, would have helped reduce the instances of ineligible expenditure which some externally led initiatives had since encountered due to the lack of evidence which they had in place to support the procurement process.

5.41   At least three externally led initiatives reported that they had since encountered areas of ineligible spending, in two cases following a visit by WEFO's European Funds Audit Team (EFAT). For instance, a representative from one external initiative claimed that Cadw guidance had changed part-way through the project but had not been communicated to the partner concerned. Consequently the goods and services procured had been deemed ineligible and the partner concerned had been required to cover a substantial shortfall as a result. In another case, legal costs, which were acknowledged to have been something of a 'grey area' in terms of eligibility, were ultimately deemed ineligible project expenditure, whilst in a third case the external lead organisation noted that they were in dispute with Cadw following a WEFO EFAT audit which had concluded that some elements of their expenditure had not met European procurement requirements.

5.42   Representatives from both Cadw and externally led initiatives stressed the importance of being able to source local suppliers when procuring goods and services as far as was realistically possible. In the main it was felt that a large proportion of the project's spending had not only been retained within Wales but also allocated locally to the heritage site under consideration. Indeed it was noted that in the case of the largest funded initiative, the construction work had been awarded to a local company and

that some initiatives had procured all goods and services (other than events related services) from within Wales. A small number of externally led initiatives noted that they had been required to secure contractors from across the border but, other than in the case of one initiative, these were considered to have been relatively small in value.

5.43 Finally, on issues relating to procurement, good practice was identified where there had been close collaboration between two externally led initiatives which were both based within the same area and jointly commissioned goods and services. This approach was considered to have worked well and it was suggested that the absence of other joint procurement exercises across the HTP had been a missed opportunity.

Individual initiative marketing

5.44 A handful of examples of good practice in relation to marketing activity by individual initiatives were identified. These included some successful launch events which had been well attended by Welsh Government Ministers and community members (such as in the case of E7). It was also suggested that Cadw led initiatives were considered to have been well placed to have benefited from the input and expertise of an internal PR team as well as the collaboration marketing officials within Visit Wales.

5.45 In contrast however, at least two contributors expressed concern that externally funded initiatives in particular had not been required to implement a communications strategy as part of their funding agreements with Cadw and only one initiative was thought to have included a budget for PR activity within its application. In general, stakeholders felt that more could have been done by individual initiatives to secure greater levels of positive PR, though in one case, where a publicity plan had been developed at the outset, their PR work had resulted in securing 31 items of printed press coverage, two television items and five radio items as well as extensive social media coverage.

5.46   A small number of external initiatives felt that they could have achieved much more in terms of PR activity whilst a few considered this to be their next priority, having completed capital works. Some argued that they had not been able to prioritise the promotion of the investments made – largely as their staffing resources had been deployed to meet other project priorities.

6. PROJECT FUNDING AND EXPENDITURE

Introduction

6.1 In this chapter, we consider the HTP's original financial profile and the project's actual final spend.

Financial Profile

6.2 Figure 6.1 presents the financial profile expected for the HTP whilst Figure 6.2 presents the expected funding sources for the project:

Figure 6.1: Forecast project expenditure by theme

	£million
Prehistoric origins and Roman invasion and settlement	1.300
Spiritual and inspirational landscapes	1.990
Castles and princes	9.671
Industrial heritage	3.200
Defence of the Realm	0.500
Thematic Sub-total	**16.661**
National Strategic Issues[45]	0.890
Project Management and evaluation	1.449
Forecast Project Total Expenditure	**19.000**

Source: Cadw 'Heritage Tourism Business Plan – Final Version' p.23

Figure 6.2: Forecast project funding

	£million
Cadw project funding	5.071
Non-Cadw project funding (direct sponsors)	1.670
Wider activities	1.196
EU funding	8.550
Targeted match funding	2.513
Forecast Project Total Funding	**19.000**

Source: Cadw 'Heritage Tourism Business Plan – Final Version' p.23

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[45] Funding for activities such as interpretation plans and events.

6.3 We appreciate that it was virtually impossible for the project to accurately project its funding and expenditure at the outset due to the fact that the final selection of funded initiatives could not be agreed upon until after the procurement process. It was also the case that very few external organisations who had declared an interest in being involved had match funding at their disposal in order to proceed with their plans.

Expenditure

6.4 In terms of project spend, data provided to the evaluation team showed that the HTP had spent £18.132 million of its allocated £19 million budget. Of this £7.032 million was spent on internal Cadw schemes and £9.266 million on external schemes, with the remaining £1.835 spent on central Cadw costs (which included project administration, architect costs, events and development of interpretation plans). Project administration costs (at £1.333 million) represented just over 7 per cent of the project's overall spend.

The final spend across each funded initiative is presented in Figure 6.3:

Figure 6.3: HTP Final Project Spend by Initiative

Cadw Initiatives	Final Eligible Spend (£)
Anglesey Monuments	186,474
Blaenavon Ironworks	562,495
Caernarfon Castle	760,564
Caerphilly Castle	201,599
Conwy Castle	592,181
Denbigh Castle	523,867
Dyfi Furnace	55,290
Harlech Castle	3,614,527
Segontium Roman Fort	27,106
St Davids Bishop's Palace	184,036
Strata Florida Abbey	323,405
Total Cadw Initiatives Spend	7,031,544
Externally led initiatives	
Calch	237,762
Carew Castle	600,000
Castell Henllys	530,000
Ceredigion Heritage Churches	272,907
Chapel Bay Fort	540,624
Denbigh Town Castle Link	113,364
Hafod Morfa Copperworks	541,063
Mona Antiqua	847,210
Our Heritage	1,568,148
Oystermouth Castle	2,490,267
Pontcysyllte Aqueduct and Canal World Heritage Site	139,717
Princes of Deheubarth	791,383
Princes of Gwynedd	448,692
Romans in Carmarthenshire	144,397
Total External Initiatives Spend	9,265,534

Source: Cadw

6.5 Three of the initiatives (namely Harlech castle, Oystermouth castle and Our Heritage) accounted for £7.7 million (or 42 per cent) of the project's overall spend – although it is worth bearing in mind that the Our Heritage

initiative spent its funding across a total of ten sites. Ten initiatives received funding below £250,000 with two of these (the Dyfi Furnace and the Segontium Roman Fort) being particularly small scale. The average spend across all initiatives stood at £651,883 and this figure was similar for both Cadw and externally led initiatives.

6.6 Over the course of our evaluation we encountered instances of underspending at an individual initiative level – largely due to the difficulties in setting a financial profile for conservation and building work, but also due to some areas of spending ultimately having been deemed ineligible. We also encountered examples of initiatives having to scale back their plans in order to curb any over-spending – for instance in the case of C3 the interpretation suite had to be scaled back by half its planed size due to the actual costs being twice what had been envisaged.

7.   CROSS CUTTING THEMES

Introduction

7.1 This chapter explores the extent to which cross cutting themes (CCTs) were incorporated into the design and delivery of the HTP and its respective initiatives. We first consider issues relating to environmental sustainability followed by equal opportunities.

CCT commitments within the HTP business plan

7.2 The HTP business plan stated that the project would be fully compliant with the cross-cutting objectives set out by WEFO and that every funded initiative would be required to comply with these requirements. The intention was that each applicant would be required to set out how their initiative would contribute towards the Environmental Sustainability and Equal Opportunities objectives and that their applications would be scored accordingly. In addition each funded initiative would be required to set out CCTs targets which would be monitored by Cadw.

7.3 The business plan sets out specific actions which were expected to be achieved in respect of the CCTs and these included the need for funded initiatives to formally obtain BREEAM[46] 'Excellent' standards and that in terms of improving access to sites that all buildings would be accessible and Disability Discrimination Act (DDA) compliant wherever practicable.

7.4 As part of the project closure process individual initiatives were asked to report how each scheme had adopted the two CCTs. A review of the information presented within these monitoring forms suggests that initiatives made considerable efforts to meet these requirements. For instance, comprehensive information was provided by each initiative on how they had addressed their proposed actions relating to equal

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[46] Building Research Establishment Environmental Assessment Methodology

opportunities and environmental sustainability as well as Welsh language considerations.

Environmental sustainability

7.5 In terms of environmental sustainability, our evaluation identified some excellent examples of how initiatives had incorporated environmental sustainability into their developments. These included investment in renewable technologies, adoption of industry building standards and re-use of materials during building work. Specific examples include:

- E2 invested in an air source heat pump to provide underfloor heating at its visitor centre.
- At E3 several elements of green technology were incorporated into the new visitor centre, including a green turf roof, enhanced insulation, a low energy lighting system and a biomass boiler. The whole site is managed sustainably, with diseased and dying trees being used to feed the boiler and being replaced by native trees.
- C6 reported having used solar panels, a ground source heat pump and a grass covered roof for a new visitor centre.
- At least two initiatives (E1 and E5) re-used materials from site in HTP funded work e.g. using rubble as the base for new tarmac paths.
- Initiatives such as E10 reported that they had incorporated BREEAM regulations as part of their developments but it was accepted that not all sites would be able to secure this standard because of their nature.
- Initiatives such as E6 invested in environmental improvements such as clearing and cleaning streetscape and providing new bins.
- The ecology report prepared by E7 as part of the project had identified the need to conserve two rare plants and bats living at the site. Work carried out avoided any damage to rare plants and a bat grill was installed so that the bats could thrive.
- E9 encouraged the use of walking and cycling and a footpath which lined with the All Wales Coastal Path was funded as part of the initiative, thereby adding value by linking existing schemes.

7.6 Those involved in delivering initiatives hoped that some of these investments, particularly in relation to renewable energy, would result in reduced energy costs over time although it was also recognised that in some cases the overall energy costs had increased simply due to being open longer, having to accommodate a greater number of visitors and having to heat and light a larger premises. Some stakeholders also stressed that a balance had to be achieved between encouraging public access and minimising the environmental impact of doing so. At one initiative this goal was achieved by raising awareness of these issues with the public, and by designing a route around the sites using established paths.

Equal opportunities

7.7 In terms of equal opportunities, feedback from representatives at funded initiatives highlighted the following examples of good practice in relation to having addressed equal opportunities:

- Several initiatives were of the view that they had been able to improve the physical access to their heritage site particularly given that funding had been used to improve entrance access (e.g. ramps, bridge, car parking) as well as improve the facilities available for visitors with specific impairments (e.g. provision of disabled restrooms).

- Many initiatives also argued that they were now in a better position to attract a more diverse audience to their sites – for instance in one case it was argued that better signposting and promotion had improved awareness of the site amongst a wider audience whilst another argued that the underlying objective of their plans had been to engage a wider audience.

- A small number of initiatives also stated that a key priority in developing new interpretation exhibitions and resources had been on making it as accessible as possible for all types of audiences.

- One initiative used HTP funding to purchase a mobility buggy for use by visitors with limited mobility.

7.8 Focusing specifically on the provision made available in Welsh all but one of the initiatives took the view that they had fully embraced bilingualism as part of their developments. One initiative had taken the decision to produce English-only exhibition materials and promotional resources (such as their website) on the basis that the provision of bilingual information at the heritage sites would not have been in keeping with the traditional language used. In all other cases all published materials which were shared with us over the course of the fieldwork (such as brochures, guides, leaflets and websites) had been produced bilingually. Furthermore, where funded initiatives had used HTP funding to source new exhibition resources and panels, they had done so bilingually. Interestingly at least two cases stressed that the HTP funding had enabled them to replace English only interpretation panels with new bilingual ones.

7.9 Finally, in relation to cross-cutting themes it is somewhat of a missed opportunity that the HTP project could not adopt any WEFO funded cross-cutting theme targets (due to the fact that the project was funded under ERDF Priority 4 which had no formal cross-cutting theme indicators) given that the project's efforts in this area were in our view meaningful and significant. We are however mindful that the project would have reported these achievements to WEFO via other means.

8. OUTCOMES AND DIFFERENCE MADE

Introduction

8.1 In this chapter, we consider the key outcomes and difference made as a result of the HTP investment. We consider the changes that have taken place in terms of visitor experience, visitor numbers, visitor dwell time[47] and visitor spending patterns. We then discuss the changes that have taken place in terms of jobs created, the impact upon knowledge, sense of place and ownership within the local community and the extent to which HTP has enabled initiatives to become a strategic gateway to other key heritage sites. Finally this chapter then presents the evidence from the fieldwork on levels of attribution and the counterfactual.

8.2 The data presented in this chapter has been based upon feedback from contributors based at the funded initiatives as well as Cadw management data (on visitor numbers and spend). Data supplied by funded initiatives has been drawn either from their own management information systems or from anecdotal and observational evidence.

Changes to visitor experience

8.3 The most commonly cited positive change identified by those responsible for heritage sites which had been involved in the HTP was an improvement to visitor experience, and this was particularly the case at sites where the investment had focused either on improving the heritage interpretation or improving the visitor centres. Interestingly many interviewees drew upon the positive feedback which they had observed from TripAdvisor reviews as well as direct feedback from visitors during their visit. Some of the specific examples of improved visitor experience observed over the course of our fieldwork are outlined in Figure 8.1:

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[47] The length of time a visitor spends at a site

Figure 8.1: Examples of improved visitor experience

- E14 reported that they were collecting a better level of customer satisfaction via their own visitor surveys.

- At C3 it was suggested that visitors are no longer required to stand in a long single queue to gain entry to the site, as the new visitor centre has two (rather than one) payment points and that group visitors can be dealt with in an efficient manner.

- C6 reported that visitors were now welcomed to an appropriate centre rather than an old, inappropriate 'shed' which had been in place previously.

- C8 reported an improved experience for visitors for the site given that the new visitor centre provided a range of new services including catering, retail, interactive facilities, digital exhibition, a bike rack, accommodation and restrooms.

- C2 and C10 both stated that their new children's trail was proving very popular and that in the case of C2 they had already handed out thousands of the 'worksheets'. The custodian at this site also commented that people were spending longer at the site than previously, as a result of the improved and interactive interpretation. Comments in the visitor book on site were incredibly positive. In the case of C10 it was suggested that the introduction of the children's trail had enhanced the experience for both children and parents alike, given that parents could now concentrate on the interpretation whilst kids were being entertained.

8.4 Very few negative comments were made over the course of the fieldwork in relation to changes to the visitors' experience – in two cases it was suggested that the new interpretation panels which had been introduced via the HTP were not as detailed as previous ones and a few visitors had commented upon the lack of information now contained within them.

Changes to visitor numbers

8.5 At the time of undertaking our fieldwork visits during August and September 2015 at least 11 of the funded initiatives were able to report a positive increase in the number of visitors over the summer period. These individual scenarios are presented below:

Figure 8.2: Feedback from initiatives on visitor numbers

- E2 noted that visitor numbers had increased by over 5,500 in the year following the completion of the initiative, but that it was impossible to be able to attribute this increase to the investment which had taken place given the impact of so many other externalities.

- E3 suggested that their visitor numbers had increased by over 9 per cent compared to the previous year (from a base of 22,000) and suggested that the increase had come about as a result of increased marketing which the HTP had enabled them to carry out.

- E4 reported a doubling of their visitor numbers from a baseline of 1,200 per year to 2,611 a year by 2014 and although the project did not reach its funded target it was confident of doing so over the course of 2015.

- E5 reported that their visitor numbers had increased three-fold since having opened their heritage site to the general public and 1,156 visitors had been recorded as having visited the site over a six month period over the 2015 summer season.

- E7 reported that their 'laser beam' counters had counted in excess of 16,000 visitors between April 2014 and August 2015, which included some 7,000 people who had visited the site in one day during a launch event. As this was a relatively 'new' site the initiative had no baseline visitor numbers to draw upon for comparison purposes.

- E8 reported a 25 per cent increase in footfall in its first year since receiving HTP funding with over 6,000 visitors up until August of this year.

- E9 reported that an additional 40,000 visitors had been recorded

across a large number of funded sites during 2014 compared to the previous year. In addition a newly developed website had received some 13,000 hits since having been set up.

- E10 reported that visitor numbers had increased by some 80 per cent and that their funded target of securing 25,000 visitors had indeed been exceeded.

- E12 reported that visitor numbers had increased by some 50 per cent since the HTP investment had been completed with around 30,000 visitors recorded across the initiative on an annual basis.

- E14 reported that their site had experienced a 19 per cent rise in visitor numbers since the investment had been completed which was thought to equate to some 4,000 additional visitors.

- C6 reported that visitor numbers had increased from around 8-10,000 per year to 13,500 since the investment had been made.

8.6 In addition at least one initiative (E1) was confident that their visitor numbers had increased yet could not provide any data to substantiate this claim. In several of the other cases it was argued that it was still too early to be able to report any changes to visitor numbers.

8.7 We encountered a few examples of funded initiatives who took the view that the investments made via the HTP had enabled them to extend the visitor season, thereby increasing visitor numbers overall. In the main these tended to be initiatives which had been able to invest in the creation or expansion of indoor facilities. One such example was C2, who noted that they were utilising their new indoor facilities to host new events. In a few other cases, initiatives had also developed a fuller programme of events, often fee-paying ones, with the objective of increasing visitor numbers during off-peak periods.

8.8 It is also worth observing that in a small number of cases, representatives stressed that whilst the nature of the investment made had been directed more towards improving the quality and dwell of the visit and would not

necessarily lead to an increase in visitor numbers. It would nonetheless help maintain current visitor numbers or revert a current decline.

8.9 In terms of evidencing the increase in visitor numbers and reporting upon visitor numbers more generally, it appeared that initiatives adopted a range of methods. Naturally the reliability of the data was considered to vary significantly with the data produced by fee-paying heritage sites (including a large number of Cadw run sites) generally considered to be the most robust. Several external initiatives (where sites were free to access and unmanned in many cases) noted that they were either already using, or had recently adopted automated visitor number equipment including 'laser beam' methods to monitor visitor numbers. Consequently questions were raised about the reliability of this data and representatives from several of the funded initiatives were acutely aware of the difficulties in generating reliable visitor data. One such initiative reported significant differences for instance between the numbers shown via its visitor counter system compared with the numbers shown via visitor sign in books whilst another acknowledged that its visitor counter system recorded both the arrival and departure of one visitor (i.e. this would be identified as two visits). Furthermore, some reporting methods were known to capture all footfall entering the site and could not distinguish between those who visited the site and those who simply passed through the site in order to reach another destination. It was also noted that the methods deployed were fairly limited in being able to generate a profile of the visitors accessing the site.

8.10   Data provided by Cadw (shown at Figure 8.3) provides a detailed breakdown for the number of annual visitors to nine of the 11 Cadw run sites supported via the HTP project as at September 2015. The data shows that three of the heritage sites experienced an increase in their visitor numbers since 2011 whilst four experienced a drop. Overall a very small increase in the number of annual visitors received was reported for these heritage sites (where baseline data was available for comparison

purposes), from a baseline of just under 600,000 during 2011 to over 609,000 as at September 2015.

Figure 8.3: Cadw Heritage Sites Annual Visitor Data[48]

Initiative	Annual Visitors – 2011 baseline	Annual visitor (Oct 2014 – Sept 2015)	Variance between 2011 and 2014/15
Anglesey Monuments	n/a	n/a	n/a
Blaenavon Ironworks	28,085	26,388	-1,697
Caernarfon Castle	191,871	187,679	-4,192
Caerphilly Castle	84,631	91,038	6,407
Conwy Castle	177,411	191,195	13,784
Denbigh Castle	13,461[49]	10,336	-3,125
Dyfi Furnace	n/a	n/a	n/a
Harlech Castle	74,335[50]	78,813	4,478
Segontium Roman Fort	n/a	458	n/a
St Davids Bishop's Palace	26,165	23,984	-2,181
Strata Florida Abbey	n/a	5,189	5,189

Source: Cadw

Changes to visitor dwell

8.11　In terms of length of visit, it was suggested by both Cadw officials and externally led initiatives that some type of HTP investments had been more successful than others in increasing the length of visit at heritage sites. In the main the most effective developments were considered to have been activity-based investments (e.g. activities for children) as well as improved facilities such as catering and retail outlets. Only one heritage site could provide concrete data on the scale of change which had taken place and in this case their own research[51] had shown that the dwell time at the site had increased from an average of around 15-20 minutes to 30-45 minutes following the HTP investment. In the case of another initiative

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[48] Visitor data has been based upon fee paying visitor information and therefore comparable data is not available for free to access sites.
[49] Data for 2013/14
[50] Data for 2013/14
[51] Conducted via observation by a member of staff who recorded the times at which visitors entered and left the site

which had invested in catering facilities, it was argued that they had seen an increase in the number of visitors who now spent a full day at the site as opposed to half a day which had been the norm previously. In another the Custodian had observed a marked change in the dwell time of family visitors as a result of the investment in children's activities via HTP and went on to argue that:

> '[the provision of children's activities had] increased adult satisfaction as a result ... it's really noticeable'.

Visitor spending patterns

8.12   At least six of the funded initiatives took the view that the HTP funded development had contributed to an increase in visitors' spend at the site concerned, which was considered vital in improving their financial sustainability. Specific examples of such increases are reported in Figure 8.4:

Figure 8.4: Examples of increased income at funded heritage sites

- E2 reported that the new indoor space created as a result of HTP investment has enabled the site to host a number of events, some of which are fee paying thereby contributing positively to their income.

- E3 reported a 29 per cent increase in its retail income following the investment made to the retail outlet.

- E8 reported an income of £40,000 during the last year at the site.

- E14 reported that they had been able to increase the site admission price from £3 to £8 thereby improving its long term financial position.

- C2 is a free entry site but reported a 90 per cent increase in spend on guide books in the visitor centre which was a demonstration of the increase in numbers since the HTP investment made.

- C5 reported that it had seen its retail income grow by approx. 10 per cent year on year since the HTP investment was made.

- C11 reported that increased visitor spending at the site (largely via its gift shop) had enabled the site to move from being one of Cadw's lowest level of spend per visitor sites to the third highest across Wales.

8.13   Despite this it was also the case that a small number of initiatives drew attention to the fact that some sites would have experienced a drop in income levels over the period of investment largely due to building works on site. Whilst there was a general effort to minimise the disruption of building work across all initiatives by planning such work to take place over the off-peak season, in reality building work was on-going at some sites over the peak season due to various delays. Furthermore at least two sites noted that as they were open all year they had anticipated a drop in income over the development phase and in one such case took the decision to allow free entry during the construction period.

8.14   In other cases it was recognised that the HTP investment would not generate any additional visitor income, simply because they were non-

revenue generating sites (e.g. in the case of E1, E6, E7, E11,C7 as well as some of the sites within E8 and E14).

8.15   Data made available by Cadw for eight of its heritage sites to have benefited from HTP investment shows that only one, namely Conwy castle, experienced an increase in the level of annual income generated between 2013/14 and 2014/15. The other seven sites experienced a drop in income and perhaps this is not surprising given the point made above by some contributors that building work during 2014/15 was disruptive to the tourism trade. It is also worth bearing in mind that the recent completion of some capital works will mean that changes to income levels have yet to be captured in full.

Figure 8.5: Cadw Heritage Sites Annual Income Data[52]

Initiative	Oct 2013 – Sept 2014 £	Oct 2014 – Sept 2015 £	Variance 2013/14 – 2014/15 £
Anglesey Monuments	n/a	n/a	n/a
Blaenavon Ironworks	372,544	341,486	-31,058
Caernarfon Castle	941,003	880,583	-60,420
Caerphilly Castle	401,201	389,642	-11,559
Conwy Castle	977,045	1,184,783	207,738
Denbigh Castle	31,459	29,148	-2,311
Dyfi Furnace	n/a	n/a	n/a
Harlech Castle	264,568	237,653	-26,915
Segontium Roman Fort	n/a	n/a	n/a
St Davids Bishop's Palace	70,006	60,590	-9,416
Strata Florida Abbey	22,380	20,379	-2,001
Total	3,080,205	3,144,264	64,059

Source: Cadw

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[52] Anglesey Monuments, Dyfi Furnace and Segontium Roman Fort are non fee-paying visitor sites

Job Creation

8.16   Our fieldwork revealed that representatives at a number of the
initiatives funded thought that they had already been able to create new
jobs directly at the site concerned as a direct result of the HTP investment.
However, other than in the case of one initiative (E10) which had created
one new post which has since been maintained (post HTP funding period),
it was clear that these new jobs had not been reported as project outputs
to WEFO. Whilst some of these had not been reported due to the fact that
they had been created after the final claim had been submitted to WEFO
in June 2015 others were simply not captured due to the project's focus on
other priorities such as completing project works and meeting audit
requirements in the run up to the end of the project.

8.17   Specific examples of jobs which were considered to have been created
as a result of the HTP investment, some of which were temporary whilst
others were on-going are shown in Figure 8.5.

Figure 8.6: Examples of jobs created at funded heritage sites

- E3 reported that the new café development on site was employing one full time member of staff and three seasonal part time workers. It was also the case that the additional visitors received at this site had resulted in the employment of two additional part time seasonal workers.

- E7 reported that a part time project manager had been employed by the lead partner to oversee the HTP investment and this post was being sustained by the organisation post project funding;

- E8 were employing one full time staff and five part time staff at one of the funded heritage sites.

- E14 noted that they had employed an additional tour guide in order to cope with the increased number of visitors following the HTP investment (which had not been anticipated previously).

- E9 made the case that the HTP investment had funded three jobs over a limited period of time but that these had since come to an end.

- C8 reported that a total of four full time and five part time posts had been created at the site since the HTP investment had been made - three part time staff to work at the visitor centre and the remaining staff employed at the new café. These posts however were not filled and therefore reported to WEFO in time for the project final claim in June 2015.

8.18 A number of initiatives anticipated creating new jobs at the heritage site over the next year or so. These are outlined in Figure 8.7.

Figure 8.7: Examples of jobs likely to be created at funded heritage sites

- E5 anticipated being able to employ a full time curator as well as a member of staff to work at the new café in the near future. The work was being undertaken on a voluntary basis at the time of our fieldwork but it was recognised that this would not be sustainable on an ongoing basis.

- E7 anticipated that some nine posts would be created over the coming three year period, and although other sources of funding would need to be secured in order to realise some of these, there was no doubt in consultees' view that the HTP had kick-started the opportunity.

- E9 suggested that future jobs would be created but as the investment had only just been completed it was too early to be specific.

8.19　At least four funded initiatives (E1, E4, C7 and C10) had not created any new jobs and did not anticipate doing so as a result of the HTP investment made. Many of the remaining heritage sites found it difficult to respond to this question.

8.20　Most of the initiatives who were employing staff prior to the HTP investment thought that the investment had helped to safeguard current posts. In all 14 of the 25 initiatives were employing staff at the time of investment and of these 12 of them provided data on the number of people employed at their site, totalling some 46 post-holders. At one of these initiatives it was argued that the investment had helped safeguard seven FTE positions which might have been under threat in the future in light of declining visitor numbers.

8.21　It is also worth noting that the HTP project has supported a small number of KESS PhD funded students over the course of its delivery – one by E8 and two by E7, who were engaged to support the development of websites, mobile phone apps and other audio devices.

Impact upon knowledge, sense of place and ownership within local community

8.22   Several specific examples were cited by both external and Cadw led initiatives whereby the efforts deployed by local staff following the HTP investment had positively impacted upon an increase in the knowledge and ownership of the heritage site concerned across the local community. This was particularly evident at two sites. The developments which had been funded at one of these sites were considered to have been instrumental in helping to reduce anti-social behaviour and vandalism thereby transforming the heritage site into a more welcoming environment for local residents. It was also the case that the transformation of derelict land at another site had changed local attitudes, not least in terms of engaging the local premier league football team with local heritage, but also more generally amongst the community:

> *'It's moved from being a problem to being an opportunity. There has been a groundswell of popular support and people can now see the potential of it as a springboard to economic regeneration – it has won over hearts and minds'.*

8.23   Several funded sites reported having experienced increased community use since having received HTP investment, not least in order to access their new catering facilities. At one site for instance it was argued that the availability of catering facilities had attracted local residents to visit, particularly given the lack of alternative café provisions within the immediate rural area. Similar feedback was provided at another whereby local residents were seen to use the new café facilities on a regular basis – without necessarily accessing the heritage site itself.

8.24   A handful of initiatives also reported that being able to organise a more intensive programme of events following the investment made (e.g. as a result of having indoor facilities or better access) had meant that they were better placed to attract a greater number of local residents. In the case of

another it was argued that the programme of events which had been introduced following the re-investment at the heritage site was generating a significantly higher number of local community visitors to the site. Several of these initiatives also pointed to the increased use of the heritage site amongst local groups. One of them for instance argued that their efforts to attract local groups such as the Ramblers Association were proving successful. In the case of another the initiative had taken innovative steps to brief local businesses on the provisions available at the heritage sites, with the aim that they be appointed 'heritage ambassadors'. In this example, a number of successful awareness-raising sessions were considered to have been delivered to local businesses.

8.25   It was also clear that the majority of funded initiatives had functioned as a catalyst to involve local volunteers (many of whom were already supportive and involved in the up-keep of the heritage sites). Indeed across the wide range of funded initiatives the input of volunteers was deployed in a number of ways including in the running heritage sites (as Trustees or Custodians) and thereby managing the HTP investment made, contributing in an advisory capacity to steering groups as well as contributing to the physical work involved via HTP (such as undertaking survey or ground clearing work and painting of sites).

8.26   In a small number of cases the use of volunteers' time had included those who were either economically inactive or unemployed. In the case of E7, for instance, the development had enlisted the input of a group of individuals who were not in education, employment or training (NEET) to help develop the site and carry out archaeological digs. At E5 the initiative offered opportunities for individuals who were enlisted on a regional ESF funded project who were economically inactive and facing significant barriers to accessing employment, to volunteer on site. Furthermore the lead contractor at E7 developed a construction-based training scheme for trainees and apprenticeships as part of the development. It is therefore worth noting that whilst the HTP project was not actually required to report

on individuals who had been supported by initiatives in this way, these are nevertheless very positive, unintended outcomes.

8.27 Interestingly our fieldwork also revealed another important change which was considered to have come about as a result of the HTP investment. This related to improved working conditions for staff and volunteers at a number of heritage sites. A number of initiatives who had received investment to carry out building work (e.g. improvements to visitor centres, restrooms etc) for the benefit of visitors also reported that staff were equally benefiting from access to these. Indeed representatives at one initiative reported a marked increase in staff morale at the site concerned given that they were now able to manage the flow of visitors arriving at the site more effectively.

Impact upon the creation of a strategic gateway to other key heritage sites

8.28 The vast majority of external initiatives as well as Cadw officials stated that one original objective for HTP had been to encourage visitors to visit more sites across Wales, whereby certain sites would function as 'gateways' from which to signpost tourists to other similar sites which might interest them. Cadw officials in particular were upbeat about what had been achieved in terms of improving the linkages between heritage sites as a result of HTP investment. They felt that the HTP had played a pivotal role in helping Cadw realise its interpretation framework and strengthening the linkages across particular themes.

8.29 Cadw officials and several externally led initiatives could point to many examples whereby the visual interpretation and promotional materials produced through HTP investment had included reference to Cadw's Interpretation Plan thematic symbols. Externally led initiatives acknowledged that they had been required to comply with the interpretation guidance issued by Cadw and adopt consistent use of the thematic symbols associated with their initiative. Despite this it was noted

that it was virtually impossible to prove whether visitors were indeed taking note of the thematic plan and visiting other sites as a result.

8.30   Over the course of our visits to funded initiatives we encountered many examples of resources and promotional materials which directed visitors to similar local sites – particularly in the case of E3, E4, E7, E8 and E9. In one case this objective was considered to have been pursued intensely in that a key goal for the initiative (which included a number of sites) had been to encourage the movement of visitors locally 'out of the honey pots to other places in the area'. In this case it was argued that the development of interactive maps and creating a story for visitors to follow would help to 'interpret the area in a consistent and attractive way to draw people … to areas beyond'.

8.31   A small number of externally led initiatives had not anticipated benefiting from being part of a wider interpretation plan or linking on a thematic basis with other sites across Wales. One in particular argued that whilst other partners had been encouraged to join their initiative, in reality only the one heritage site had been funded as part of the Defence of the Realm interpretation theme, thereby limiting such opportunities.

8.32   Furthermore a few contributors suggested that some anticipated linkages between HTP funded initiatives had not necessarily come to fruition. For instance in one case, representatives at the funded initiative argued that whilst strong links had been established across heritage sites which formed part of the Princes of Gwynedd initiative similar links with those sites forming part of the Princes of Deheubarth were not explored. Representatives at another initiative argued that there had not been any other initiatives similar to them funded via the HTP whilst another argued that their particular heritage site did not fit well with any of the interpretation themes set out for the HTP and Cadw's Interpretation Plan. This suggests that further support and encouragement may have been needed to realise some of the potential linkages between sites. For instance, occasional networking events, enabling the different HTP

initiatives to come together may have assisted better links between the key people involved.

8.33   More generally, externally funded initiatives were inclined to suggest that the lack of opportunities to develop thematically based linkages had been a 'missed opportunity'. For instance a custodian at one heritage site suggested that there had been no direct reference made within the new interpretation resources developed for their own site to a local property which had been included within another HTP initiative, and fell under the same interpretation themes.

8.34   A common theme raised by those operating heritage sites related to whether there had been too much of an emphasis within the HTP upon pursuing the thematic linkages at the expense of creating practical spatial links, as it was argued that visitors are more inclined to visit other local heritage sites within easy reach rather than other similarly themed heritage sites further afield.

Additionality

8.35   Feedback from representatives at both Cadw and externally led initiatives emphasised the fact that HTP funding formed a proportion of overall investment made at the sites concerned, and that as such its attribution should be considered within this context.

8.36   It was clear in the majority of externally led initiatives that the lead partner would have been unable to have attracted the match funding required had HTP funds not been forthcoming in order to deliver the original plans. This was particularly the case for initiatives led by local authorities who stressed that in the absence of HTP funding and Targeted Match Funding the local authority would have been unable to source a similar level of funds internally to enable the developments to take place.

8.37   In general, contributors thought that some of the initiatives' objectives would probably have been realised and tended to stress that funding would have been focused upon maintenance related costs as opposed to the transformational upgrades which HTP funding had enabled them to carry out. This was particularly true for Cadw led initiatives and feedback from Cadw representatives tended to suggest that their core funding would have been prioritised for the basic maintenance and repair of heritage sites rather than creative interpretation work. Indeed the availability of HTP funding was considered to have enabled Cadw in particular to undertake a more much ambitious programme of work than would have otherwise been the case . This view echoes the evidence presented in the original project Business Plan submitted to WEFO which states that it would have been 'very unlikely' that the activities funded via the project would have been implemented without the financial assistance of the project. It does however acknowledge that Cadw may have been 'able to implement some of its own projects on a smaller scale, over a longer period of time'.

9. ECONOMIC IMPACT

Introduction

9.1 In this chapter, we assess the economic activity linked to the HTP project. In approaching this analysis it is worth considering a number of issues. Project indicators embraced a measure of gross job creation, initiatives developed, and cumulative visits at sites which benefited from HTP investment (see earlier). Among these indicators it is the visits that is a key factor in driving the economic impact of infrastructure improvements i.e. in terms of safeguarded or additional visits. Unfortunately the figures collected by the HTP project in terms of cumulative visits numbers provide a limited perspective on impact. A series of issues are important here:

- individual visitors are likely to vary in their spending patterns and consequent economic impacts; this is not fully captured in a cumulative visits measure

- attributing economic impact to visitation is problematic because it is difficult without detailed survey work to find out how far improvements levered by the HTP led to a visit

- key economic impacts of visitation might not occur close to the heritage sites concerned, but in the wider area around sites. For example, improvements leveraged through the HTP might result in additional visits to an area, but with only part of the visitor spends on site

- without detailed baseline information it is difficult to link visitation to improvements, and even with a high quality baseline, additional visitation, or the maintenance of visitation might be due to externalities such as the weather

- much of the economic impact of HTP improvements might be expected to be realised in terms of safeguarding visitation to selected sites rather than leading to additional visitation.

9.2 The HTP project was examined as part of the Environment for Growth project evaluation undertaken by Cardiff University for Welsh Government. This research examined visitation to a sample of surveyed HTP sites and that were subject to visitor surveys and, where possible, indicated the estimated economic impact at non-surveyed sites using data collected at other similar initiatives within the overall E4G project as a proxy.

9.3 In this chapter, we review the findings from the E4G report as it relates to the economic impact of visitors to HTP sites. We then use some of the economic information from the E4G study to estimate the economic impact associated with visitation that might be deemed to be additional at selected sites.

Key findings from the E4G evaluation

9.4 The economic activity supported by visitation to HTP sites in the E4G report was assessed in terms of spending, incomes (gross value added) and jobs. However, the E4G study also assessed the regional effects of leveraged tourism spending i.e. taking account of how tourism spending created indirect economic effects in the Welsh economy. Importantly the E4G evaluation attempted to take account of issues relating to double counting and additionality where, for example, a visitor might have been motivated to a visit a HTP site because of that specific castle, but might have visited other Welsh tourist sites during the same trip. As such, summing a whole-trip impact, and attributing this to the HTP project would result in an over-estimate of the activity directly supported by the HTP site.

9.5 To counter this problem, the E4G research only allocated a single day's impact (including one night's accommodation for staying visitors) to an HTP visit. More problematic were issues of displacement i.e. where visitors to a HTP site are made as a result of fewer visits to non-assisted heritage and other tourism sites. The E4G work was not able to adjust economic effects for this and accepted that there would be some displacement from other Welsh sites.

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9.6 The E4G evaluation examined the economic impact of the Heritage Tourism Project (HTP) strategic project from November 2009 to August 2014. As part of the E4G HTP research, 28 visitor surveys were undertaken covering 3,830 individual returns across 22 individual sites (Caernarfon, Caerphilly, Conwy, Harlech, St Davids and Blaenavon were surveyed twice over the duration of the project).

9.7 Figure 9.1 summarises the economic impact associated with visitation to these sites. Note the E4G approach took account of different types of visitation (daytrip, staying visitation etc), and grossed information from completed visitor surveys to the overall visitor numbers at each site over a year or season as appropriate. The E4G research estimated economic effects associated with the whole visitor trip, but then took account of economic effects connected with a visit to a specific E4G site/event and classified this as an on-site impact i.e. associated with visitor spending at the HTP site or event.

Figure 9.1: HTP 2013. Economic Impacts associated with 19 Sites

Type	On site
Annual Visitors	935,776
Dates for visitors	2013 or 2013/14
Questionnaires completed	2,474
Number in respondents' parties	8,685
Directly attributable to site	
Gross Value Added	£13.6m
Employment FTEs	738
GVA to create each job	18,417
Visits to create job	1,268
On-site GVA per visitor	14.53

Source: E4G Project Research, Cardiff Business School[53].

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[53] based on figures derived from Carew Castell 2013 Castell Henllys 2013 Pembroke 2013 Dinefwr 2013 Dinas Emrys 2013 Llanddwyn 2013 Copper Kingdom 2013 Great Orme Mines 2013 Pendeitsh Caernarfon 2013/14 Oystermouth Castle 2013 Blaenavon Ironworks 2013/14   Caernarfon Castle 2013/14 Caerphilly Castle 2013/14 Carreg Cennen Castle 2013/14 Conwy Castle 2013/14 Criccieth Castle 2013/14 Denbigh 2013/14 Harlech 2013/14 St Davids 2013/14

9.8   Figure 9.1 shows that taken as a whole 19 HTP sites surveyed
(Caernarfon, Caerphilly, Conwy, Harlech, St Davids and Blaenavon were
surveyed twice) were underlined connected to annual on-site spending of an
estimated £13.6m and with 738 FTE jobs supported directly and indirectly
by on-site visitor consumption. The E4G research also estimated
economic impacts directly attributable to visitor spending at sites where
visitor surveys were not undertaken. Here, average spend per visitor and
economic impact details were taken from the overall HTP surveyed sites
average. These figures were applied to the non-surveyed site annual
visitor number to generate economic impacts. The estimated total visitor
spending impact of HTP initiatives that did not carry out a survey was
£5.2m of value added per year; supporting around 283 FTE jobs.

Figure 9.2: Estimated Economic Impact of non-surveyed HTP E4G initiative sites

HTP Project	Site	Annual Visitor Number	GVA £s	FTE
Strata Florida Abbey		4,846	76,000	4.1
Calch	Black Mountain Quarries	10,938	171,600	9.2
Princes of Deheubarth	Carmarthen	18,626	292,200	15.7
Chapel Bay Fort		180	2,800	0.2
Hafod Morfa Copperworks		7,128	111,800	6.0
Our Heritage	Great Orme Country Park	192,765	680,600	37.3
Our Heritage	Llandudno Museum	3,233	50,700	2.7
Our Heritage	Llechwedd Slate Caverns	49,511	776,600	41.9
Our Heritage	Quarry Hospital/ Park Padarn	90,535	1,420,100	76.5
Pontcysyllte Aqueduct and Canal	Llantysilio Green C/Park/Horseshoe Fls	41,638	653,000	35.2
Princes of Gwynedd	Conwy Tourist Information Centre Hub	15,818	n/a	n/a
Princes of Gwynedd	Dolbadarn	40,574	636,400	34.3
Princes of Gwynedd	Dolwyddelan	4,586	71,900	3.9
Romans in Carmarthenshire	Dolaucothi Roman Gold Mines	18,882	295,700	15.9
TOTAL		**499,260**	**5,239,400**	**282.9**

Source: E4G Research, Cardiff Business School[54]

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[54] In the E4G research no visitor volume data was available for Swansea Castle (Castles &
Princes project); Ceredigion Churches; Holyhead, Parys Mountain, and Hubs (Mona Antiqua);
or Carmarthen Fort, Carmarthen Museum, Waun Ddu and Yr Pigwn Ddu (all Romans in
Carmarthenshire).

9.9　Summing the economic impacts associated with on-site visitor spending connected with site initiatives (surveyed and non-surveyed) then it is estimated that in total they could be connected with impacts of around £19m of GVA per year and with this supporting employment of around 1,000 full-time employees. Clearly this does not include spending associated with a wider tourism visit (i.e. castle heritage may form a key part of a visit lasting many days), neither does it consider the impacts of the capital spend associated with HTP developments which were assessed separately in the E4G research.

9.10　Perhaps as importantly, the above analysis tells us more about potentially safeguarded visitation than additional visitation leveraged by the HTP improvements. It is virtually impossible with tourism sites to link capital improvements to additional visitation because of the various factors that will influence a visit to a site, and with many visitors not realising the nature of improvements. That said, it is useful to attempt to develop some scenarios of additional visitation in order to illustrate the potential magnitude of economic impacts.

9.11　In the earlier part of our report (Figure 4.4) it was shown that without robust monitoring data there are problems in concluding whether initiatives met targets in terms of additional visitation leveraged by improvements. However the earlier analysis revealed that for five sites, where more detailed evaluations had been undertaken, a significant number of additional tourism visits had been experienced. For example for five sites (Ceredigion Heritage Churches, Hafod Copperworks, Mona Antiqua, Our Heritage and Oystermouth Castle), that of a total target of 142,580 additional tourism visits up to December 31st 2014, some 107,803 had been achieved, none of the initiatives had been able to hit their funded target by the end of December 2014 i.e. around 75 per cent achievement.

9.12　Clearly there are questions as to whether this performance could be generalised across the different HTP sites, and indeed whether performance in terms of additional visits could be maintained year on year.

However, our fieldwork revealed that externally funded initiatives were upbeat that targets had been achieved and at least 11 of the funded initiatives were able to report a positive increase in the number of visitors to their site(s) since the investment had been made. It was also shown in Chapter 4 of the report that some externally led initiatives believed that the original additional tourist visits targets were set too low.

9.13   Chapter 4 also found that the number of additional tourism visits expected for the 14 externally funded initiative sites was 139,255. Clearly this is only part of the HTP project but it is useful to analyse what this level of additional tourism might lever in terms of Welsh economy effects. Drawing conservatively from the evidence above and taking account of the different factors that influence tourism visits and problems of attribution, we examine two scenarios where 25 and 50 per cent of the outcomes for this selection of 14 sites might be considered additional on the funded improvements and lead to a sustainable increase in visitation, and making an assumption of zero displacement across other tourism sites. Assuming the make-up of visitation to these sites is similar in character to averages derived from surveyed E4G HTP sites (see Figure 9.1 above) some economic impact scenarios are presented in Figure 9.3.

9.14   Figure 9.3 reveals that were 25 per cent of these visits genuinely additional then this would lead to an increase in Welsh GVA of an estimated £0.5m, and with the spending supporting this GVA leading to 27.5FTE job opportunities across Wales. Note these are not on site job opportunities but this is an indication of how the additional tourism spending at sites supported opportunities directly and indirectly across the regional economy. The 50 per cent additionality scenario would see an estimated £1.01m of GVA supported and around 55 FTE job opportunities.

Figure 9.3: Collective and individual targets set for externally led initiatives

	Additional tourism visits annually on completion of works	£ GVA impact 25% visits additional	£ GVA impact 50% visits additional	FTE jobs supported in Wales directly and indirectly 25% scenario	FTE jobs supported in Wales directly and indirectly 50% scenario
Calch	4,500	16,346.3	32,692.5	0.9	1.8
Carew Castle	10,000	36,325.0	72,650.0	2.0	3.9
Castell Henllys	5,000	18,162.5	36,325.0	1.0	2.0
Ceredigion Heritage Churches	3,700	13,440.3	26,880.5	0.7	1.5
Chapel Bay Fort	5,555	20,178.5	40,357.1	1.1	2.2
Denbigh Town Castle Link	0	-	-	-	-
Hafod Morfa Copperworks	12,000	43,590.0	87,180.0	2.4	4.7
Mona Antiqua	0	-	-	-	-
Our Heritage	35,350	128,408.9	256,817.8	7.0	13.9
Oystermouth Castle	20,000	72,650.0	145,300.0	3.9	7.9
Pontcysyllte Aquaduct and Canal	0	-	-	-	-
Princes of Deheubarth	32,000	116,240.0	232,480.0	6.3	12.6
Princes of Gwynedd	7,750	28,151.9	56,303.8	1.5	3.1
Romans in Carmarthenshire	3,400	12,350.5	24,701.0	0.7	1.3
TOTAL	**139,255**	505,843.9	1,011,687.7	27.5	54.9

10. SUSTAINABILITY OF DEVELOPMENTS AND THE FUTURE

Introduction

10.1   In this chapter, we consider the sustainability of the developments funded via HTP, including whether they have contributed to improving the financial sustainability of heritage sites and future options.

Sustainability of funded developments

10.2   Representatives who had been directly involved in making decisions in relation to the provisions funded via HTP were eager to stress that significant consideration had been given to funding developments which had a long life span and which would withstand both general 'wear and tear' as well as unfavourable weather conditions. Despite this, some frustration was voiced by representatives across a small number of initiatives that elements of their investment had not withstood the test of time. This was particularly true for some technical investments such as touch screen displays at one site which kept breaking down since having been installed. It was also the case that over the course of our visits to each heritage site we encountered specific developments which were not functioning properly (e.g. C4, C5, C10 and E13) or which had a number of spelling/grammar mistakes in the Welsh translation of the interpretation (e.g. C2).

10.3   The fieldwork also revealed many instances where the developments were being maintained via the partnerships established. In the case of one such initiative (E4) for example the operations group which had been established to oversee the HTP developments had continued to meet to discuss the on-going maintenance and promotion of the heritage sites concerned. In this case the group had agreed to contribute a nominal amount of funding each to maintain their newly established website and to

source future funding for the purposes of printing brochures and leaflets as required.

10.4   Other initiatives had exceptionally ambitious plans for building further upon the investment made via HTP, although it was not always clear how these plans would be funded particularly given current public sector cut-backs. This was particularly evident at one initiative where the partnership had developed an ambitious and detailed ten year plan to further develop the site and its immediate surroundings to include creative workshops, educational facilities, housing and a living history laboratory yet were at the time of undertaking our fieldwork unable to fund the website and social media campaign which had been instigated within HTP. The project manager had been retained by one of the key partners in order to continue the project work and to secure other sources of future funding. In this case it was argued that:

> '*The HTP work conducted on the site has made it a much more attractive offer for housing and commercial activity nearby. This has to be married to other forms of income.*'

10.5   At least two external initiatives suggested that it would have been beneficial for the links established with Cadw staff to have been maintained post funding period in order to maximise the impact of future heritage investment at the site concerned.

10.6   The fieldwork with Cadw staff revealed that plans were already underway to consider a second phase of HTP and at the time of our fieldwork a proposal entitled 'Attractor Destinations' had already been submitted to WEFO for consideration to be funded within the current 2014 – 2020 ERDF programme[55]. It was suggested by some contributors that a greater focus would be placed on funding investments which would be more likely to generate revenue income at heritage sites in the future.

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[55] See http://wefo.gov.wales/applyingforfunding/ideas/?lang=en accessed 30 September 2015

11. CONCLUSIONS AND RECOMMENDATIONS

11.1 In this chapter, we outline our overall conclusions as well as make a series of recommendations for the future.

11.2 We conclude that the HTP was designed and developed with the benefit of a supportive Welsh policy context and was well rooted in and aligned with those key Welsh Government policies which were focused on both the Welsh historic environment and tourism sector. Over the course of implementation the Welsh policy context has remained supportive of the underlying objectives of HTP, with an increasing focus being placed upon widening access and use of heritage sites both amongst local communities and visitors alike. Strategic documents published during the course of the HTP's implementation phase (such as Cadw's interpretation plans) have provided an additional level of detail which has helped inform the delivery of the project, in-line with its original objectives, although the feedback from our fieldwork suggests that greater collaboration across funded initiatives could have helped fulfil this objective even further.

11.3 We further conclude that the HTP made very good progress against its WEFO funded targets having achieved two of its three key performance indicators, including the number of visitors at supported heritage sites. However, it is also the case that there has been some under-reporting in relation to achievements against two of these key performance indicators, given that visitor data was only reported for 13 of the 25 funded initiatives supported across the project and that the creation of jobs was only considered for one funded initiative in addition to the core project management team employed at Cadw.

11.4 It is very difficult to come to a view about the success or otherwise of individual funded initiatives in meeting their respective targets – largely due to the lack of robust final monitoring data for externally funded initiatives as well as the lack of original targets made available to the evaluation team for Cadw led initiatives. Where such data was made available to the evaluation team it was found that none of the initiatives

had managed to achieve their visitor targets by December 2014. The main factors accounting for this under-performance were delays in commencing project delivery (which impacted upon initiatives' ability to meet targets within the original timescales set) as well as other initiatives having only completed the work during 2015 and could not therefore provide any visitor numbers post completion of work.

11.5   Despite this, we conclude that the HTP was successful in meeting its twin aims – namely to improve Welsh heritage destinations and produce visitor focused heritage interpretation at these sites. We encountered strong evidence to suggest that funded initiatives had achieved what they set out to achieve, despite having faced many common challenges. We further conclude that the investments made were in keeping with the overall aims and objectives of the project – indeed some of the larger investments made have transformed the quality and attractiveness of the heritage sites in question. The HTP has been less successful in realising the project's ambitions in terms of developing better linkages across heritage sites be that on a spatial, thematically and chronological basis, and we conclude that opportunities were missed to further strengthen linkages across funded initiatives.

11.6   Turning to explore the project's efficiency, there are numerous examples of good practice. For instance, Cadw's efforts to promote the funding opportunities available via the project ought to be commended as well as the process of procuring externally led initiatives. Another key strength has been the fact that the availability of HTP funding has encouraged and enabled successful partnerships to be developed in several instances, with these partnerships being sustained even after the project funding came to an end. A key area to consider for any future provision however relates to the difficulties experienced by externally led initiatives to source match funding – this was considered to be the main factor which deterred organisations from applying to the HTP at the outset.

11.7   Ironically one of the project's key strengths, namely its inclusive approach of funding a wide range of initiatives across the Convergence

area, was also considered to be a key challenge during the implementation phase. In particular the ambitious nature of the project (as measured simply by the number of initiatives funded) placed significant pressures upon the allocated staffing resources at the project level – with Cadw resources overly stretched between the management of external providers as well as to overseeing their own internally led initiatives. This experience would certainly suggest that for any future similar project, either core staffing resources ought to be increased, or that the number of initiatives funded be set at a more manageable number.

11.8   In the same manner, although for different reasons, individual initiatives had also generally under-estimated the resources required to manage their funded initiative. The main factor which had contributed to this issue was the greater than anticipated demands placed upon externally led initiatives by WEFO, via Cadw, in terms of complying with EU financial and reporting monitoring requirements. The feedback would certainly suggest that the real administrative and reporting costs incurred by those organisations who have managed smaller initiatives (indeed ten of the 25 initiatives supported overall received funding below £250,000) was disproportionate to the scale of investment made. This does in our view raise a question as to whether better value for money might be achieved by allocating larger funding amounts across fewer heritage sites in the future.

11.9   The evaluation has identified a number of key learning points in terms of how a project similar to HTP (i.e. part delivered by external partners) could be better managed in the future. Of critical importance would be the need for WEFO to establish formal written guidance covering procurement, monitoring, reporting, promotion and project closure requirements and for this to be communicated (via Cadw) to any externally led initiatives from the outset. The small number of cases which had encountered areas of ineligible spending gives rise to some concern and again reinforces the importance of developing formal procurement guidance in the future for a similar project.

11.10 Furthermore, we would suggest that Cadw allocate greater resources to the role of supporting external initiatives, ensuring that regular review meetings be held with all external partners in any future similar project. In response to the feedback from externally led initiatives that communication between funded initiatives had been very weak, we would also suggest that any future similar initiative adopts a proactive approach to bringing initiatives together in order to share experiences and good practice, as well as facilitate opportunities to commission joint services and embrace opportunities to develop interpretation linkages.

11.11 In terms of maximising the value of heritage to the Welsh economy by increasing the volume, length and value of visitation to Welsh heritage sites, we reiterate the findings of the E4G research which found that the HTP investment could be connected with impacts of around £19 million of GVA per annum and that this supported employment of around 1,000 full time employees. Drawing upon the findings of this evaluation, the additional tourist visits associated with externally funded initiatives could be expected to lead to an increase in Welsh GVA of £0.5 million leading to 27.5 FTE job opportunities (if we are to assume that 25% of visits were genuinely additional ones) or an increase in Welsh GVA of £1.01 million leading to 55 FTE job opportunities (if we are to assume that 50% of visits were additional).

11.12 The HTP has invested £18.132 million of its allocated £19 million budget. Project administration costs (at just over 7 per cent) formed a fairly low proportion of the overall spend, although the feedback from externally led initiatives suggests that actual administrative costs have been much higher and are not reflected in actual spend data.

11.13 Turning to present our conclusions on the difference made by the HTP, there is ample evidence to show that the investments made have resulted in a marked difference to visitor experiences at the sites which have benefited from investment. In the same manner, our fieldwork suggests that at least 11 of the funded initiatives could report upon an increase in the number of annual visitors – although these increases were yet to be

reflected in the 2014/15 visitor data made available by Cadw for their own heritage sites. A small number of initiatives could also report upon an increase in the visitor dwell time and at least six of the funded initiatives took the view that the HTP funded development had contributed to an increase in visitor's spending at the site concerned. Again, the increase in visitor spending was not reflected in the 2014/15 data made available by Cadw for their own heritage sites supported by HTP – with the very recent completion of some capital works being a key consideration in this respect.

11.14 The feedback secured from representatives at funded initiatives on which type of investments would have yielded the greatest return shows that investment in the creation or expansion of indoor facilities and promotional activity frequently results in visitor number increases; investment in activity based provision particularly for children as well as improved facilities such as catering and retail outlets resulted in increased dwell time; and investment in retail and catering facilities resulting in increased visitor spending.

11.15 Our research has also shown that the HTP has resulted in the direct creation of new jobs across in at least five of the funded initiatives, and that many of these jobs could be directly attributed to the investment made and, importantly would be sustained in the future. These new jobs were not reported as project outputs to WEFO suggesting again that the HTP has, in practice under-reported its achievements. In terms of other unintended outcomes our research uncovered several examples whereby the HTP funding had enabled those employed and volunteering at various heritage sites to increase the knowledge and ownership of the site concerned across the local community. Several sites reported increased community use – often this was linked to the provision of an events programme at the site concerned. The evaluation also found many instances whereby the HTP investment had functioned as a catalyst to involve the input of local volunteers, and in a small number of cases the use of volunteers' time had included giving work experience to those who were either inactive or unemployed.

11.16 We conclude that the HTP performed very well against its cross cutting themes aims and objectives. During the course of our fieldwork we encountered excellent examples of how funded initiatives had fully embraced both environmental sustainability and equal opportunities objectives. In particular we would highlight examples of investment in renewable technologies, the adoption of industry building standards and the re-use of materials during building work. Furthermore our fieldwork revealed excellent examples of improved physical access to heritage sites and improved facilities for visitors with specific disabilities or impairments. In terms of making provision available in Welsh, all but one of the initiatives had fully embraced bilingualism as part of their developments. Whilst these achievements would have been reported to WEFO, the project did not have any cross-cutting themes key performance indicators due to it being funded under ERDF Priority 4.

11.17 We make the following recommendations for the delivery of any future similar project to HTP, particularly if it were to be funded via European funding:

Recommendation 1: We recommend that appropriate mechanisms be put in place to capture and report upon all outputs achieved across funded initiatives, so as to ensure a future similar project does not under-report against its performance indicators to WEFO. This would involve defining and adopting 'softer' or more 'informal' targets to measure project achievements in the future including changes to visitor experiences, visitor spending and visitor dwell time.

Recommendation 2: To achieve this, we further recommend that greater consideration be given to a more consistent method of defining, monitoring and reporting project outcomes from the outset. This would include allocating an appropriate budget for undertaking baseline, mid-term and final reviews. These would include the formal inclusion of cross-cutting theme targets within any future project, given the success of the HTP in this area of work.

Recommendation 3: We recommend that any future project invests in developments which are more start-ready than has been the case with HTP, to ensure that delays are minimised.

Recommendation 4: We recommend that the project sponsor encourages greater contact and collaboration between funded initiatives, and that a particular focus of this facilitation role should be on identifying how heritage sites can be linked on a spatial, thematic and chronological basis in order to better realise Cadw's Interpretation Plan.

Recommendation 5: We recommend that any future EU funded project to support heritage tourism sites in Wales adequately promotes the funding opportunities available to various organisations at the outset – drawing on the good practice demonstrated within HTP. We would however suggest that greater consideration be given to addressing the previous difficulties experienced by some providers in securing match funding in the future, although we are mindful that this may prove challenging given the current financial pressures upon public sector budgets.

Recommendation 6: We recommend that a future scheme funds a smaller number of more strategic initiatives, and that the selection of those initiatives be determined by considering the benefits which are likely to be achieved against a small number of economic impact criteria. We would suggest that the criteria adopted include the number of visitors safeguarded, additional commercial revenue generated, number of jobs directly created and number of jobs indirectly created.

Recommendation 7: We recommend that the lead partner responsible for any future similar project ensures a suitably resourced core team to manage the project is in place from the outset. This team ought to adopt the dual responsibility of project managing the scheme as well as overseeing the delivery of any initiatives which that organisation would be responsible for. A key requirement for this central team would also be the provision of support and guidance to any external providers.

Recommendation 8: We would recommend that formal procurement guidance be developed and agreed at the outset between WEFO, lead sponsor and any other partner organisations involved in the delivery of a future similar project.

Recommendation 9: Finally, we recommend that a future similar project develops and adopts a clear communication and promotional strategy which sets out the expectations for the lead body as well as each individual initiative, and that these requirements are set out in any delivery funding agreement.

Annex 1: List of Interviewees

Name	Organisation
Stakeholders	
Andrew George	Cadw
Andrew Roach	Cadw
Catrin Ellis	Cadw
Chris Wilson	Cadw
Dave Penberthy	Cadw
David Rees	Cadw
Howard James	Cadw
Kate Clark	Cadw
Kate Roberts	Cadw
Nicola Weekes	WEFO
Stephanie Woodward	Visit Wales
Stephen Jones	Cadw
Visits and interviews were undertaken at the following initiatives and sites:	
Externally funded initiatives:	
E1 Calch	
E2 Carew Castle	
E3 Castell Henllys	
E4 Ceredigion Heritage Churches	
E5 Chapel Bay Fort	
E6 Denbigh Town Castle Link	
E7 Hafod Morfa Copperworks	
E8 Mona Antiqua	
E9 Our Heritage	
E10 Oystermouth Castle	
E11 Pontcysyllte Aqueduct and Canal World Heritage Site	
E12 Princes of Deheubarth	
E13 Princes of Gwynedd	
E14 Romans in Carmarthenshire	
Cadw funded initiatives:	
C1 Anglesey Monuments	
C2 Blaenavon Ironworks	
C3 Caernarfon Castle	
C4 Caerphilly Castle (no interview undertaken)	
C5 Conwy Castle	
C6 Denbigh Castle	
C7 Dyfi Furnace (no interview undertaken)	
C8 Harlech Castle	
C9 Segontium Roman Fort (no interview undertaken)	
C10 St Davids Bishop's Palace	
C11 Strata Florida Abbey	

Annex 2: Summary of HTP Funded Initiatives

Internal Projects

1. Anglesey prehistoric monuments

This project covered a number of sites, including Barclodiad y Gawres and Bryn Celli Ddu. In addition to improved access and interpretation at Barclodiad y Gawres and the installation of an interpretation kiosk at Bryn Celli Ddu that acts as a hub for exploring the wider prehistoric Angelsey, interpretation panels were also installed at Din Lligwy.

2. Blaenavon Ironworks

Access to and within the site has been improved as a result of HTP investment. Interpretation has been installed in the form of a mixture of bespoke art, panels, a new exhibition, dressed spaces and a multi-sensory 'furnace experience' that explains the iron making process that made Blaenavon famous.

3. Caernarfon Castle

The HTP has provided funding for a new specially designed glass fronted visitor centre at the entrance to the Castle Gatehouse which reflects its World Heritage Site status. Work has also been carried out to improve the interpretative displays and exhibitions available to visitors.

4. Caerphilly Castle

The new interpretation at Caerphilly Castle, completed over several phases of work, includes a 270˚ animated film show; a series of sculptures and models by Welsh or Wales based artists; a digital portcullis; a touch table interactive; a digital fireplace in the Great Hall; a children's trail; interpretative banners as well as new interpretative gates that greet the visitor on entry. The castle now forms a central hub for visitors to follow the story of the Lords of the Southern March.

5. Conwy Castle

The Heritage Tourism Project has improved the existing visitor facilities on site, including a new interpretation scheme. Visitors are met with a short animated film that puts the castle's links with Edward I in to context. The rest of the site's story unfolds using sculpture, reinstating stained glass in the chapel windows, a series of panels, an interactive children's quest, plus digital projection and sound effects.

6. Denbigh Castle

Completed in 2012, the HTP investment has provided a new purpose-built visitor centre, improved access to the town walls and allowed for better presentation and interpretation of the monument, including a children's trail.

7. Dyfi Furnace

New interpretation at this site in Ceredigion, such as interpretation panels with a built in children's quest, a working model of the bellows and decorative ironwork, all help to tell the furnace's story. There is also downloadable video footage available to tell the story of the resident bat population.

8. Harlech Castle

The largest scheme in the HTP project saw the conversion of the ground floor of an adjacent former hotel into a new visitor centre with exhibition and tea room. Value was added by turning the upper floors of the hotel into self-catering apartments (non HTP funded). A new bridge was also installed into the castle, significantly improving access, along with new interpretation panels and exhibitions in the castle itself.

9. St Davids Bishop's Palace

Completed in 2013, the new interpretation at this site helps bring the history of the palace to life. Multi-sensory interpretation is complimented by panels, picnic table-top graphics and a children's trail.

10. Segontium Roman Fort

The HTP has provided funding for interpretation at an existing visitor centre on the site.

11. Strata Florida

The Heritage Tourism Project has funded a complete overhaul of the visitor centre, as well as extensive new interpretation aimed at helping visitors to better understand the site. The new exhibition includes displays of conserved artefacts, touchscreen displays and informative panels, and outside an events area and giant floor map have been created.

External Projects

1. Calch – *led by Dyfed Archaeological Trust*

The project presented the industrial heritage of the limestone industry of the Black Mountain, Carmarthenshire, by implementing new interpretation and physical and intellectual access improvements, such as a new visitor centre, new interpretation panels at sites and promotional material and events.

2. Carew Castle – *led by Pembrokeshire Coast National Park Authority*

The project delivered a refurbishment of an existing space within the castle to provide a year-round events venue and indoor area, in addition to improved visitor facilities, interpretation and landscaping of the wider site.

3. Castell Henllys – *led by Pembrokeshire Coast National Park Authority*

This site in northern Pembrokeshire was improved with the adaptation of an existing building to provide a new visitor centre with café and retail space. Interpretation was also updated throughout the site, and promotion of the wider prehistoric landscape in the local area was also included.

4. Ceredigion Heritage Churches – *led by Llandre Heritage*

This 'Peaceful Places' project has delivered a unique walking trail, made up of churches and chapels in Ceredigion. HTP funding allowed for capital works at various sites to improve accessibility, interpretation and a website.

5. Chapel Bay Fort – *led by Pembrokeshire County Council*

HTP funding enabled the restoration, refurbishment and interpretation of this site near Milford Haven. Volunteers played a large part in ensuring the successful delivery of this project.

6. Denbigh Town Castle Link – *led by Denbighshire County Council*

Local artists were commissioned to create artwork to tell the history of the area and to link the town with its historic past. This artwork was placed along a pedestrian route between the town centre and castle, along with appropriate interpretation and signage.

7. Hafod Morfa Copper Works – *led by Swansea University*

This project has restored several listed buildings and established walking trails around the site in Swansea. New artwork, information and interpretation have also been installed at the site, and several events held.

8. Mona Antiqua – *led by Mona Antiqua*

This project, based in Anglesey, has seen interpretation work carried out at the Copper Bins Amlwch Heritage Centre, Parys Mountain and various sites in Holyhead. Hubs have been also been set up ats everal sites across the island. Conservation and interpretation work has taken place at Llanddwyn Island, which is associated with St Dwynwen, the Welsh patron saint of lovers.

9. Ein Treftadaeth/Our Heritage – *led by Gwynedd Council*

This HTP project has funded site-specific improvements at Llechwedd, the Quarry Hospital and Padarn Lake Railway in Llanberis, Taith y Llechen between Tregarth and Bangor, Lôn Las Ogwen and Lôn Eifion and North Wales Pilgrims Way which links St Winefride's Well in Flintshire to Bardsey on the Llŷn Peninsula, Llandudno Museum, Great Orme Bronze Age Mines and Great Orme Country Park.

10. Oystermouth Castle – *led by the City and County of Swansea*

Work has been undertaken to improve access to the site and provide a new visitor centre with facilities and activities area. A part time job has been created at the site as a result of the investment.

11. Horseshoe Falls, Llangollen Canal – *led by Denbighshire County Council*

This project improved access and interpretation along the Llangollen canal stretch of the Pontcysyllte Aqueduct and Canal World Heritage Site, and improved visitor facilities at an existing visitor site.

12. Castle and Princes– *led by Carmarthenshire County Council*

This project delivered site specific capital investment and new interpretation at several castles in Carmarthenshire and Pembrokeshire, and established a heritage trail at Dinefwr Castle. HTP funding also allowed for suitable marketing and promotional material to be developed.

13. Princes of Gwynedd – *led by Conwy County Borough Council*

Six exhibition hubs were established across the project area, with interpretation and signage installed at several Cadw sites including Criccieth castle, Dolwyddelan castle, Dolbadarn castle and Castell y Bere. A new welcome centre at Craflwyn for Dinas Emrys was also completed.

14. Romans in Carmarthenshire – *led by the National Trust*

This project has delivered substantial improvements in the Dolaucothi Gold Mine site by installing new interpretation. Interpretation and accessibility has also been improved at Carmarthenshire Amphitheatre. Other sites dating from the Roman era that have been improved as a result of this project includes Y Pigwn marching camp, Waun Ddu fortlet and Carn Goch. A display of Roman artefacts at Carmarthenshire Museum has also been funded.