

The **HERITAGE COUNCIL**

The **Economic Impact** of the
HERITAGE SECTOR in Ireland





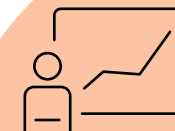
About this report

This report provides estimates of the economic impact of the heritage sector in terms of economic output and employment.

High-level scope



Undertake analysis and consultations to determine what sectors should be included in the contribution of heritage to the Irish economy.



Economic impact analysis:
Estimate the current baseline economic impact of the heritage sector in terms of Gross Value Added (GVA), economic output, and employment.



Case studies on key heritage sites and events to determine the heritage sector's wider social and economic benefits to its community.

Key sources for the report

Information sources including:

Central Statistics Office (CSO) data



Public sector organisations' annual reports



Irish and international reports



Survey of 40 key heritage sector organisations and programmes



Our collective knowledge of the industry, enhanced with:

12 workshops and 6 one-to-one interviews with key heritage sector stakeholders



CONTENTS

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The Economic Impact of the
HERITAGE SECTOR in Ireland

01	Executive summary	06
02	Introduction	10
03	Approach Taken	22
04	The heritage sector's economic impact results	32

05	Case studies of heritage sector's wider impact	46
06	What next? Recommendations for further research	63
07	Appendix A	70

1 Overview & findings

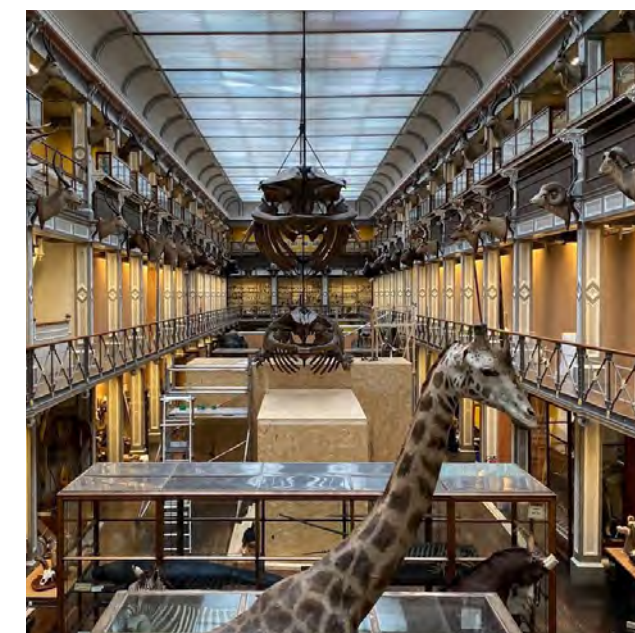
The impact of heritage on the Irish economy is sizable and growing.

Aims and purpose

The heritage sector goes about its business quietly. The primary aim of the study is to broadly show heritage's importance to the Irish economy through presenting research outcomes concerning the heritage sector's direct, indirect, and induced contributions through economic output, Gross Value Added (GVA), and employment.

The study's purpose is that by quantifying heritage's impact on the economy better informed decision making can occur concerning the supports provided to the heritage sector.

A secondary aim for the report is to ascertain data gaps and suggest research topics that can guide future decision making and policy design.



Process

Shaping the Scope: Before applying an economic impact model we needed to define what would be counted as part of the study.

NACE Codes: We examined all 97 NACE level 2 sector codes used by the CSO to categorise the Irish economy for the non-nominal impact of heritage activity. Fifteen applicable sectors.

Stakeholder Engagement: The boundaries of consideration, as well as investments, grants and employment were refined through stakeholder consultation involving 12 workshops, 6 interviews and questionnaires.

Economic Impact Analysis: The report uses an economic impact assessment to estimate the heritage sector's impact on economic impact, GVA, and employment.

Input-Output Model: A modified Input-Output (I-O) table based on the CSO's 2020 symmetric I-O table is used to analyse inter-product utilization within the Irish economy.

Employment Estimation: The report estimates the number of heritage-related jobs using data from the 2022 Irish Census.

Outcomes

A set of figures was created concerning the heritage sector's direct, indirect, and induced contributions through economic output, Gross Value Added (GVA), and employment (see next page).

Heritage makes a discrete but sizeable impact on the Irish economy. That impact is growing.

Our research suggests the top 10 sectors account for c.98% of the heritage sector's economic value. This broadly aligns with recent research published in England.

A important data collection issue was uncovered within the heritage sector which currently makes it impossible to accurately map and quantify heritage related employment. A recommendation for a research unit has been included in this report.

To address data/knowledge gaps a comprehensive set of research questions are provided dealing with role heritage plays in the economy, society and the challenge of climate change and biodiversity loss.

Executive Summary

The heritage sector economic impacts

€4.6bn

annual contribution to Ireland's economic output arising from the heritage sector



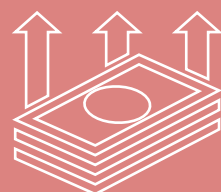
€2.6bn

annual contribution to economic output arising from the heritage sector direct spend



€2.0bn

annual contribution to economic output arising from indirect and induced impacts



62,000

jobs supported by the heritage sector and its value chain



The heritage sector adds value across the Irish economy: direct, indirect, and induced contributions to economic output, gross value added and jobs[1].

Multiplier of 1.8



meaning that for every €1 million spent by the heritage sector an additional €0.8 million is generated through its value chain

€2.4bn

annual contribution to Ireland's GVA [2] arising from the heritage sector



€1.4bn

annual contribution to GVA arising from the heritage sector direct spend



€1.0bn

annual contribution to GVA arising from indirect and induced impacts



€1.8bn

annual household income supported by the heritage sector and its value chain



Notes:

[1] Values are for 2022 and are based off most recent data, [2] GVA – Gross Value Added

2 Introduction

“The heritage sector contributes substantially to Ireland’s economy, the liveability of our communities and the fight against climate change. This is recognised in the Heritage Council’s Strategic Plan, *Our Place in Time*.”



Introduction

Background and purpose

This study expands on existing research to show heritage's importance to the Irish economy

Heritage Sector

The heritage sector contributes substantially to Ireland's economy, the liveability of our communities and the fight against climate change. This is recognised in the Heritage Council's Strategic Plan, *Our Place in Time*. This plan outlines the importance of heritage in economic, social, and environmental contexts, and sets goals for its preservation and enhancement.

This study expands on 2011 research on the value of heritage to Ireland's economy. The Heritage Council wants to update and significantly expand this analysis.

An up to date, comprehensive assessment of the value of Ireland's heritage will help the Heritage Council make the strongest possible case for investment into heritage protection, preservation, and enhancement.

Purpose of this report

Because the Heritage sector goes about its business quietly, its importance to the economy is not fully appreciated. Heritage is especially important to the domestic economy. Data from Fáilte Ireland illustrates how the tourism sector is built upon the historic structures, natural landscape and culture of Ireland. Similarly, although the agriculture sector has become largely industrialised, the country's food and drink propositions are heavily reliant on natural heritage and tradition. These are just two cases of heritage's structural significance to the economy.

The purpose of this study is to broadly show heritage's importance to Irish economy. It will do this by presenting the outcome of research concerning:

- The heritage sector's direct, indirect and induced contribution through, economic output, Gross Value Added (GVA) and employment.
- The impact of heritage broken down for sub-sector / industry.
How heritage related sectors interact with the wider economy.
- The ancillary contributions made by the heritage sector in the form of spillover impacts through tourism and rural and urban regeneration.



The interaction of heritage within the economy and society is complex. Aside from associated employment, heritage impacts the State's international business reputation and political standing. It also influences people's health, wellbeing, and quality of life. Then of course, there is the vital role it plays in efforts to combat climate change. Consequently, a set of further research questions are presented to better understand the depth and breadth of the impact of heritage. The research questions are complemented by recommendations concerning data collection.

Ultimately, it is intended by quantifying heritage's impact on the economy both in this report and follow on research that better informed decision making can occur concerning the supports provided to the heritage sector. Such information will illustrate how support for heritage is not just intrinsically important but also has broader impacts to core aspects of the economy.



Introduction Report structure

The report has been structured to clearly articulate the benefits of the heritage sector to the Irish Economy.

1

Section One of this report sets out the motivations behind conducting the study and a brief overview of key technical economic and heritage terms used throughout.

2

Section Two explains what is within the scope of this report, highlighting specific areas that have been excluded from our analysis but may be appropriate for further study. It then describes the approach taken to gathering information from stakeholders and the economic modelling approach.

3

Section Three describes the direct impact the heritage sector has on Ireland's economy, considering the impact on economic output and employment.

4

Section Four describes the heritage sector's indirect and induced impacts on Ireland's economy. It also considers spillover effects on sectors adjacent to heritage, such as tourism and urban and rural regeneration.

5

Section Five contains six case studies that demonstrate different ways in which heritage can create economic value or employment opportunities. They also illustrate some of the wider social and environmental benefits that the heritage sector brings to Ireland. These case studies are:

- The Traditional Farm Buildings Scheme
- Bere Islands Project Group
- Heritage Week
- Enhanced Decommissioning Rehabilitation and Restoration Scheme
- Viking Triangle, Waterford
- Nano Nagle Place, Cork

6

Finally, **Section Six** recommends topics for further research and analysis to help demonstrate the value that heritage contributes to the Irish economy, climate action, biodiversity loss, health and wellbeing, social value, community cohesion, education, and research & development.

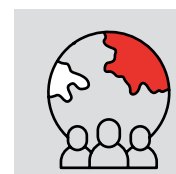
Introduction

A brief explanation of key technical economic and heritage terms

What do we mean by heritage?

Heritage is what we have inherited from the past, to value and enjoy in the present, and to preserve and pass on to future generations. For the purpose of this report, we have subdivided heritage into three categories: built / tangible, natural, and cultural / intangible.

Built Heritage



Built heritage refers to the human-made structures and monuments that reflect the historical, artistic, architectural, or technological achievements of a society. These include our historical sites, buildings and monuments. Some of examples of economically significant built heritage sites in Ireland include: the Brú na Bóinne UNESCO complex in Co. Meath, the Great Western Greenway in Co. Mayo, Kilkenny Castle, Russborough House in Co. Wicklow, and the Viking Triangle in Waterford.

Natural Heritage



Natural heritage refers to the biodiversity and geodiversity of a region, as well as its landscapes, seascapes, habitats, ecosystems, and geological features. It includes our waterways, landscapes, woodlands, bogs, uplands, native wildlife, insects, plants, trees, birds and animals. Some examples of economically important natural heritage sites and services in Ireland include: Killarney National Park, pollination services for agriculture, coastal defences, the Cliffs of Moher, and fishing (please note: natural heritage services and the fishing industry have not been included in the assessment of economic impact).

Cultural heritage




Cultural heritage refers to the traditions, customs, beliefs, values, languages, arts, crafts, music, literature, and folklore that shape the identity and diversity of a community. Some examples of economically important places and practices associated with cultural heritage in Ireland include: the GAA, the Fleadh, the Book of Kells, the National Museum of Ireland, Riverdance, summer Gaelcholaistí (Irish language schools), and the Knock Shrine pilgrimage site.

A critical challenge in this study is defining what is in and out of the scope of “heritage”. The European Cultural Heritage Skills Alliance wrote in 2022 that, “heritage is omnipresent and concerns all citizens.” Several organisations consulted through this study argued that their entire sector or large parts of it should be considered heritage related, given their associations with the landscape and traditional Irish culture or ways of life.

For the purpose of this study, we consider the aspects of heritage that intersect with economic activity, employment, and investment. Thus, we include economic activities such as the renovation of historical buildings, tourism and accommodation activities provided to visitors drawn to Ireland by its heritage, and work to preserve and display historical documents and art.

It does not attempt to account for the value Ireland’s heritage adds to society, to the environment, to community cohesion, or to individuals’ health and wellbeing. It also does not account for the value of brands that draw on Ireland’s natural heritage or history, such as Kerrygold butter or Jameson whiskey. These may be valuable topics for further research (see Section 6). Some exploration as to the wider value of heritage is provided through the six case studies in section 5.



This study accounts for the value Ireland’s heritage adds to economic activity across three core categories built, natural and cultural heritage: Due to the often complex interaction between the various aspects of heritage, no breakdown along built, natural or cultural heritage is provided. This may be a topic of further research.

What do we mean by economic impact?

Economic impact is a measure of how the activities related to heritage affect the economy in terms of output, income, employment, and value added. It can be divided into three types:

Direct impact



This is the economic activity generated by the heritage sector itself, such as the spending of heritage organisations, their employees, and their suppliers. For example, the direct impact of a museum would include its operating expenses, wages, and purchases of goods and services.

Indirect impact



This is the economic activity generated by the suppliers of the heritage sector, such as the manufacturers of equipment, materials, or energy. For example, the indirect impact of a museum would include the output, income, and employment of the industries that provide the museum with electricity, water, security, or cleaning services.



Induced impact



This is the economic activity generated by the household spending of the employees of the heritage sector and its suppliers, such as the consumption of food, clothing, entertainment, or health care. For example, the induced impact of a museum would include the spending of the museum staff and the staff of its suppliers on various goods and services in the economy.

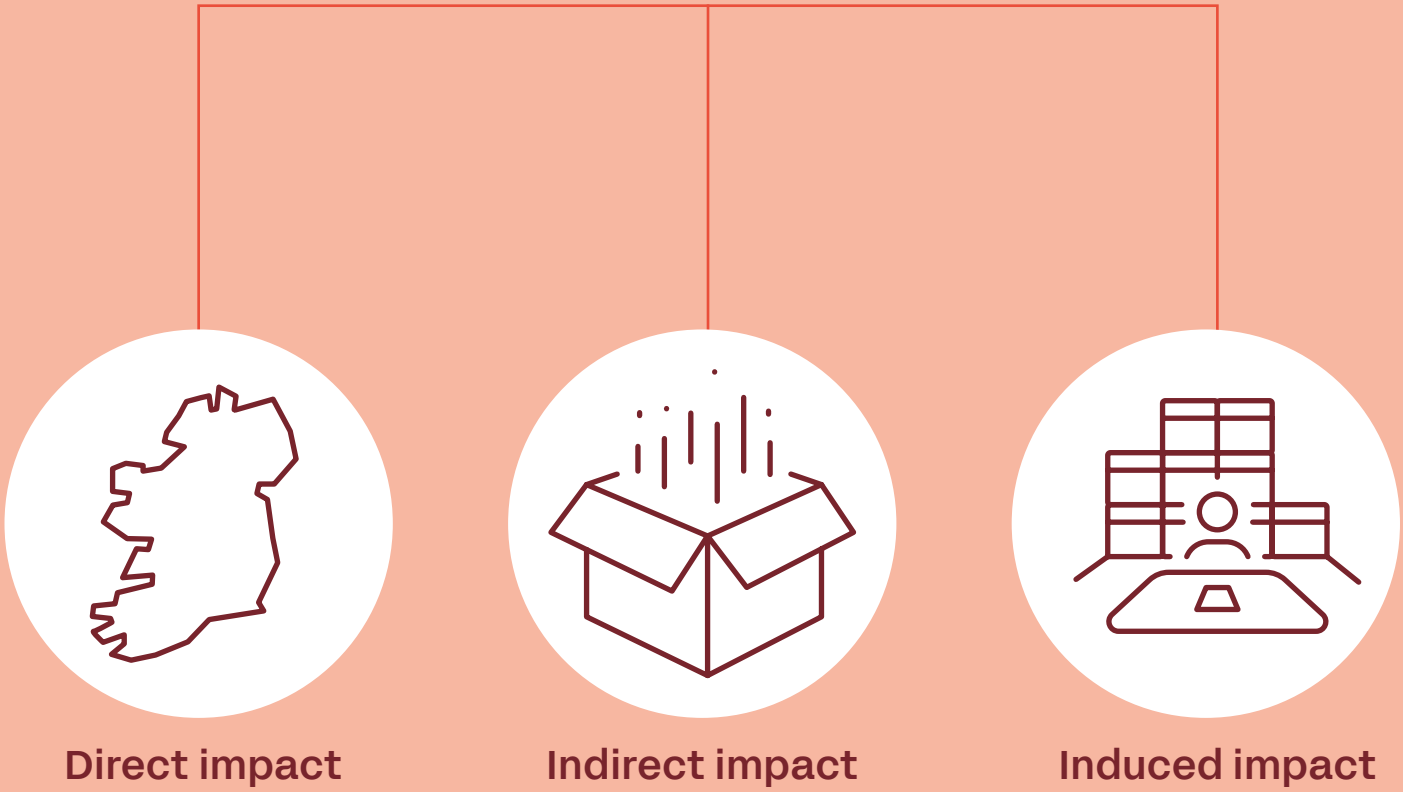
The total economic impact of heritage is the sum of these three types of impact. It captures the multiplier effect of heritage spending, which means that every Euro spent by the heritage sector generates additional economic activity in other sectors of the economy.

This is then used to calculate the Gross Value Added (GVA) which represents the difference between the output of an economy and the intermediate consumption (the value of goods and services used up in production). Essentially, GVA shows how much value is added by the production process.

In addition to these economic impacts, it is critical to note that heritage contributes to many other aspects of life in Ireland. For example:

- The practice of ancient sports such as hurling contributes to players’ physical health and promotes cohesion in rural communities;
- Volunteer guides at historical sites and buildings benefit from social interaction, training in public speaking, customer service, and history;
- The preservation and appreciation of Ireland’s natural landscape contributes to people’s mental health and wellbeing. The preservation and restoration of Ireland’s natural landscape also has a vital role to play in climate action and reversing biodiversity loss;
- Heritage cultural practices, such as traditional music and dance, help bring together members of the Irish diaspora worldwide, promoting cultural exchange and trade;
- Ecological services carried out by bogs and wetlands help purify Ireland’s drinking water and reduce the threat of flooding to villages, towns and cities.

Total Economic Impact





3

Approach Taken

Shaping the scope

A key task was establishing where to draw the line for measuring the heritage sector.



NACE Codes

‘Nomenclature générale des Activités économiques dans les Communautés Européennes’(NACE) is a classification of economic activities developed by the EU. It is also the system used by the Central Statistics Office (CSO) in Ireland to break down the Irish economy into its various industries.

For the purposes of this study, we examined the applicability of heritage to all 22 NACE Level 1 sectors (A-V) used by the CSO. Going deeper, we also inspected all 97 NACE Level 2 sectors for the applicability of the heritage sector*. This was done in conjunction with our in-house heritage expert and checked against relevant international studies conducted in the UK and Australia.

Our review indicated that 15 NACE level 2 sectors involved heritage above a nominal level. We then sought to discover what weightings attributable to heritage would be appropriate for these 15 sectors. These weightings informed the inputs to the model used to estimate impacts.



The weightings were created through a process involving:

- ⊙ Review of relevant national and international studies;
- ⊙ Documentary research on each sector;
- ⊙ Workshops and interviews with key stakeholders; and
- ⊙ Questionnaires issued to key stakeholders.

NACE language and heritage

It is acknowledged that the standardised nature of NACE terminology used to name and sort economic sectors does not fully represent the role heritage plays in Irish society. However, due to the national and international adoption of the NACE classification system, and the economic impact focus of this study, the use of NACE terminology is unavoidable. Nonetheless, we have – where possible – been mindful of how the use of economic language may cause some unease for those who value the broader benefits heritage provides to Irish society. As a result, it is used only where deemed necessary to realise the objectives of this report.

*Please note. Although strictly speaking there are 99 NACE Level 2 sectors used by the CSO, it has no number on the 98th (Undifferentiated Goods) and 99th (Extra territorial organisations) sectors.

Stakeholder engagement was essential to establishing the extent of the heritage sector.

NACE Codes

The most useful method used to create appropriate weightings across the 15 NACE sectors were direct conversations with relevant stakeholders.

In total, 12 workshops and six one to one interviews were conducted over two phases. Ten workshops and all six interviews took place in phase one. This phase was focused about getting a better understanding of each sector, validating the methodology, and testing some initial assumptions as to the importance of heritage within that sector. The workshops and interviews took place in June and July 2024. The six interviews took place where certain key stakeholders could not attend a workshop or when the subject matter was particularly niche (e.g. CHARTER, the European Cultural Heritage Skills Alliance).

Round one workshops:

- Local authority heritage staff
- Agriculture sector
- Landscape and nature restoration
- Professional services, administration and support sector
- Construction sector
- Cultural heritage sector
- Tourism sector
- The Heritage Council staff
- The Heritage Council board



Held in August, the two round two workshops were attended by mixed audiences representing key stakeholders in especially important sectors (i.e. construction, agriculture, government administration, arts, tourism, education). The function of these workshops was to calibrate our results.

Questionnaires

Complementing the workshops and interviews was a questionnaire issued to 40 organisations and programmes in some way associated with the heritage sector. All questionnaires were tailored for each targeted respondent. All were sent directly via email, with a reminder issued to increase the response rate. This was done to increase the response rate.

Although the questionnaires were crafted for each person, in general, the questions asked addressed the following topics:

Heritage related activities

Reason: to help the team draw the line of what is or is not a heritage related activity.

Number of Full Time Equivalent employees working on heritage related activities, especially those who could call themselves heritage workers.

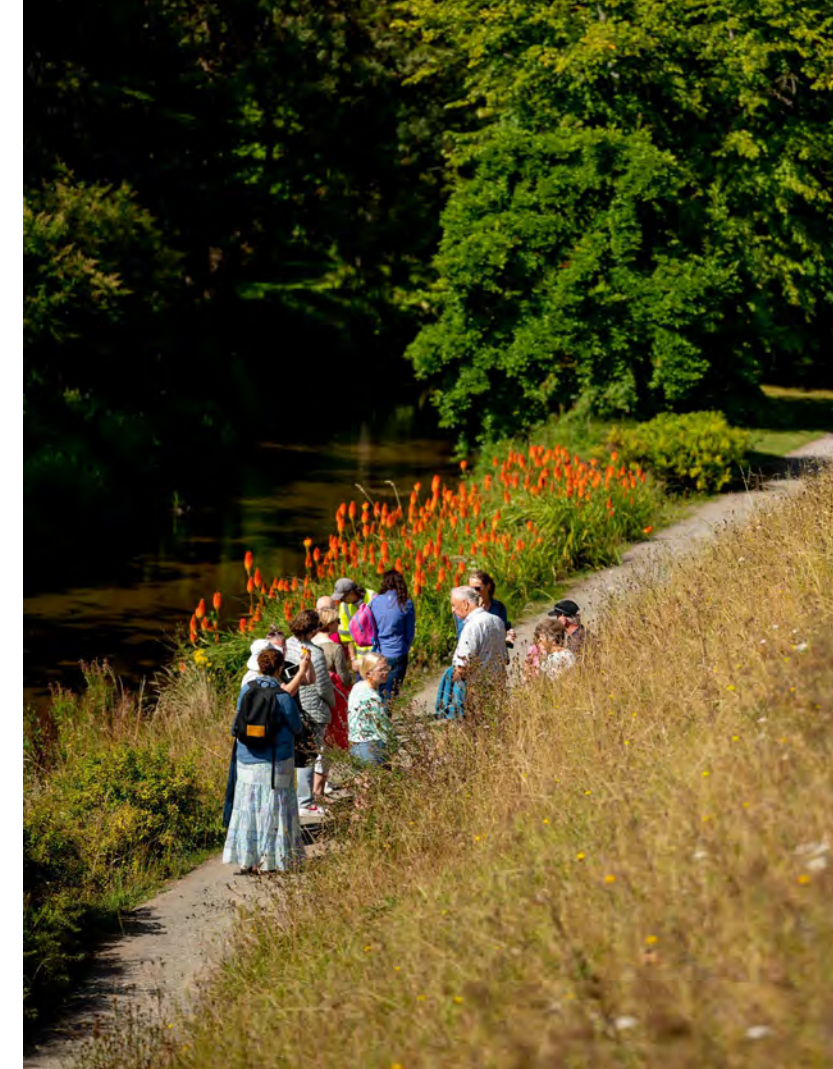
Reason: to quantify and map heritage related employment in detail

Heritage related budgets and investments

Reason: to better understand the flow of money within the sector.

Heritage related grants

Reason: to understand the grant landscape and avoid double counting as regards funding.



Economic impact analysis

Our economic impact assessment estimates the Heritage sector's impact on economic output and employment.

Context

Our sector profile gives an indication of key economic metrics for the Heritage sector. We expand on this by considering the sector's wider economic impact through inter-industry linkages.

We applied our economic impact methodology to estimate the sector's wider economic impact in terms of Gross Value Added (GVA) and employment.

Definitions and viewpoint

Economic impact assessments consider the injection of income as a result of a specific event, policy choice or economic activity from a specific industry.

The Heritage sector buys inputs that are produced in different sectors within the economy. The purchase of production inputs creates a flow of expenditure and a multiplier impact within the economy

Additional information on the model and assumptions used to calculate the heritage sectors contribution to the Irish economy are provided in Appendix A

Economic impact analysis

An increase in demand for products and services related to the heritage sector requires producers (the Heritage sector) to increase their purchases of goods and services from their suppliers to produce the product/service in question.

In turn, sectors supplying to Heritage related activities increase their purchases of the goods and services they need to produce the products they supply to the Heritage sector.

This creates additional rounds of expenditure in the value chain, also referred to as the multiplier impact, that leads to increased output and employment. The overall economic impact can be categorised in terms of the following components:

Direct:

Impacts directly accruing from expenditure by the Heritage sector (e.g. expenditure on restoration activities of Heritage sites).

Indirect:

impacts generated by expenditure by firms within the sector's supply chain.

Induced:

Impacts generated by the spend of individuals and firms outside the sector as a result of increased incomes (e.g. additional household expenditure as a result of increased incomes).

Measuring economic impact

Our impact assessment estimates the national level economic impact of the Heritage sector's value chain in terms of GVA.

Employment

Using 2022 Irish Census, the number of jobs per unit of output in each sector is then calculated. Then the total number of direct jobs linked to heritage in each sector is calculated by multiplying this by the direct spending in each sector related to heritage activities (determined using a weighting matrix).

Multipliers are then utilised to calculate the overall spending in each sector tied to heritage activities. This, combined with the jobs-per-output ratios, allows us to estimate the total number of heritage related jobs in each sector. The difference between the total jobs and direct jobs represents the number of indirect jobs.



Approach taken

Overview of sectors that contribute to heritage

Sectors contribution to heritage [1]	Description
Construction	Maintaining and restoring heritage sites using traditional crafts like stonemasonry, carpentry, joinery, bricklaying, blacksmithing, plastering, thatching, roofing, tiling, and decorating. New builds associated with interpreting and providing additional amenities to heritage attractions.
Accommodation services	Hotels and similar accommodation located in heritage buildings, Holiday and other short-stay accommodation associated with built heritage or natural heritage sites. There are close to 100 heritage hotels and wedding venues (i.e. in a historic building and/or area of natural beauty). Majority of which are 4 and 5 star hotels.
Education	Ireland's education system integrates heritage education at various levels, from primary to further and higher education. This includes learning about Ireland's rich history, culture, natural landscape, traditions, building crafts, and language, which helps in preserving and promoting heritage.
Agriculture	Agriculture has shaped virtually all of Ireland's rural landscape, creating the iconic patchwork of fields, stone walls, and farmsteads that are integral to the country's cultural heritage.
Culture activities	There are a number of culture activities that have heritage at their core. This includes the economic impact, funding and support for museums, galleries, and historical sites, ensuring that cultural heritage is maintained and accessible to the public.
Architectural and engineering activities	Architecture and engineers are closely related to heritage activities as it often involves the preservation, restoration, and adaptive reuse of built heritage.
Public administration	Public sector staff working in heritage associated activities across the various government departments, local authorities, and state agencies.
Travel agency, tour operator	Tour operators and other reservation services play a crucial role in the heritage sector by facilitating access to heritage sites and cultural experiences.
Food and beverage services	Food and beverage services play a crucial role in the heritage sector by offering visitors a taste of local cuisine, which is often an essential part of cultural heritage. These services enhance the overall experience of visiting heritage sites thereby preserving and promoting culinary heritage.
Other professional activities	There is a number of other professional services that contribute to the heritage sector including but not limited to; archaeologists, conservation & restoration, surveyors, ecologists, photographic, translation and interpretation activities etc.

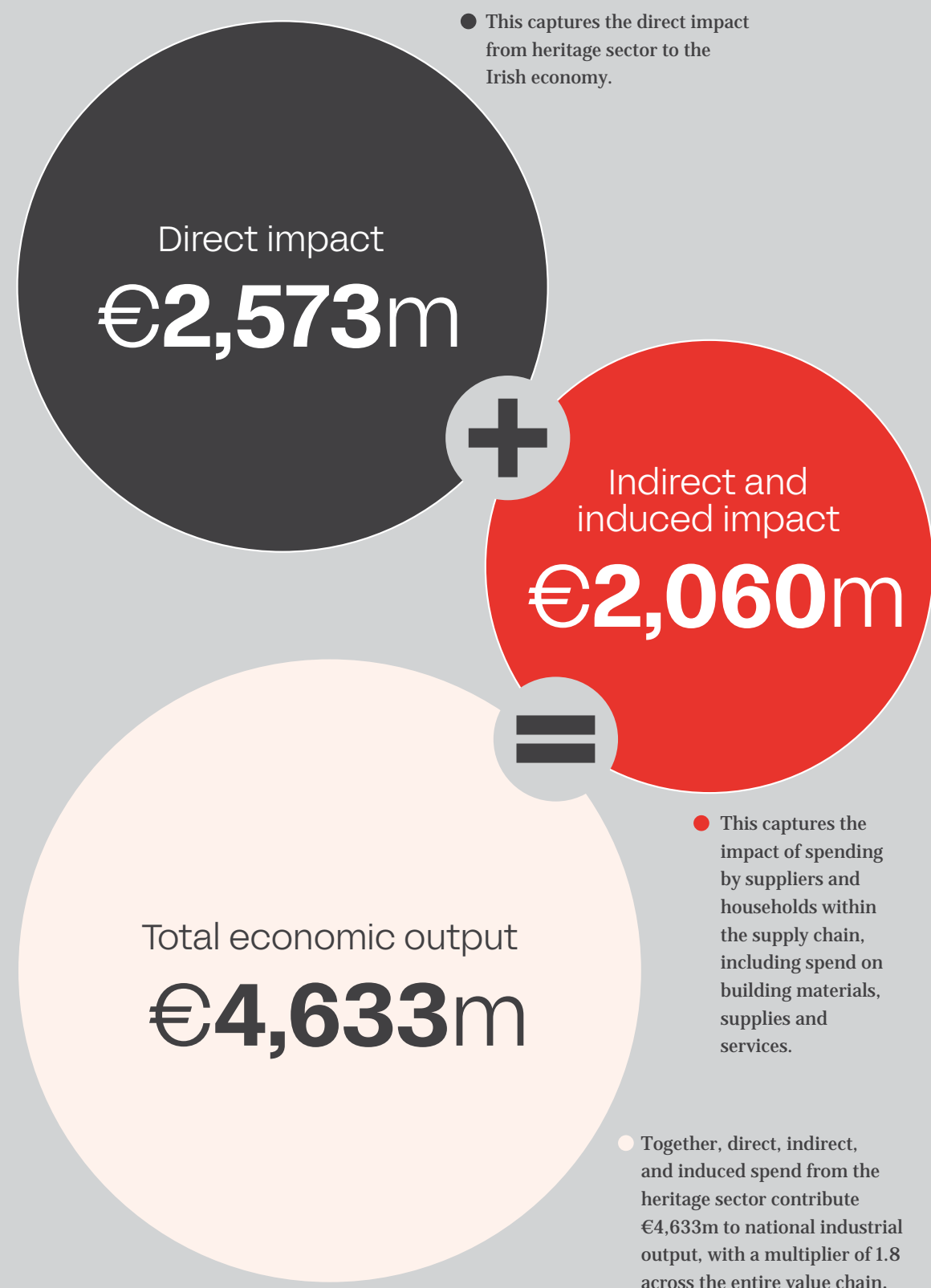
Notes: [1] These sectors are determined by NACE sector codes.



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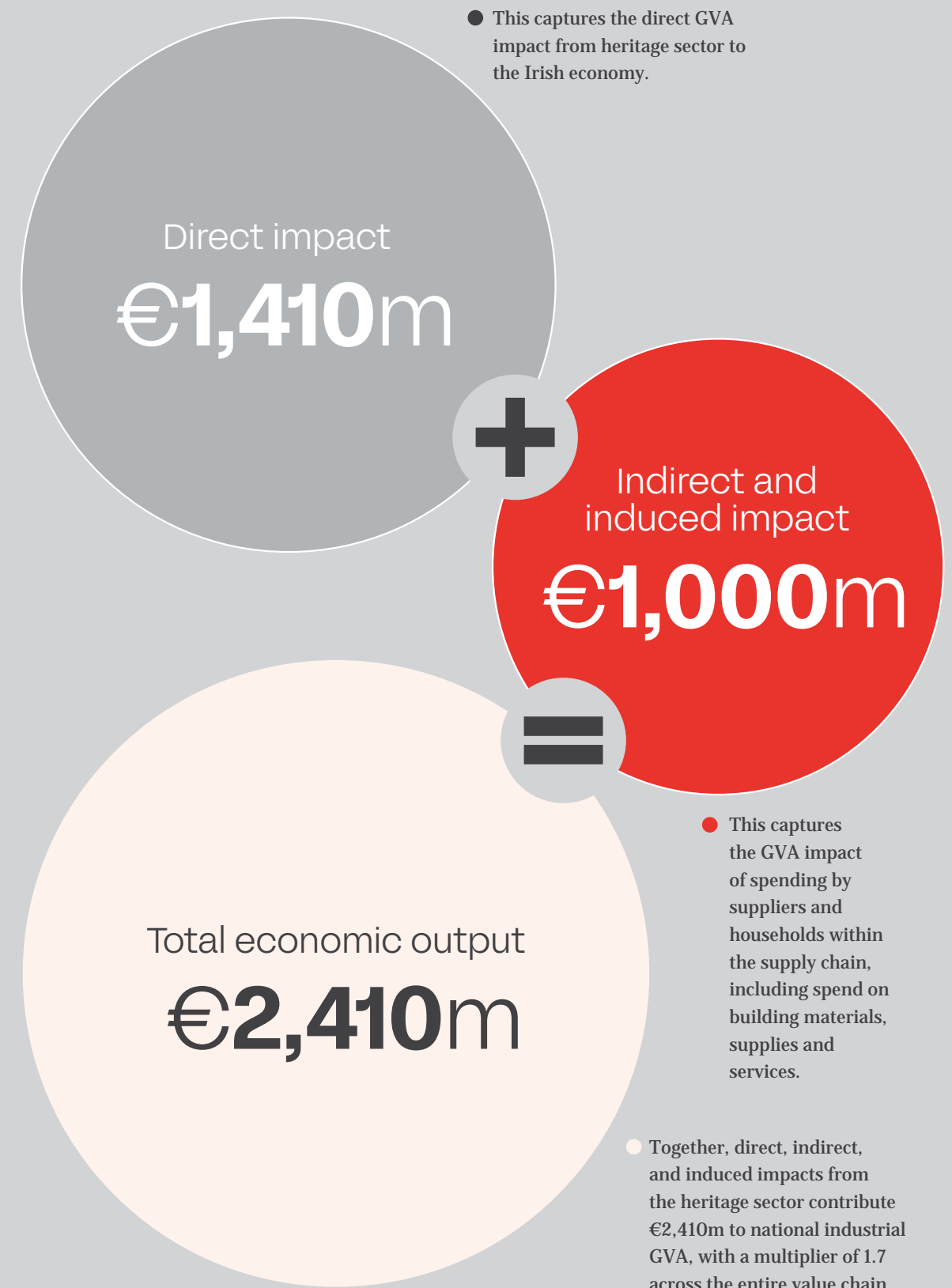
The heritage sector's economic impact results

Economic impact of the Heritage Sector: Economic Output



Source: [a] CSO, [b] KPMG analysis

Economic impact of the Heritage Sector: Gross Value Added



Source: [a] CSO, [b] KPMG analysis

The heritage sector's total impact: Economic Output

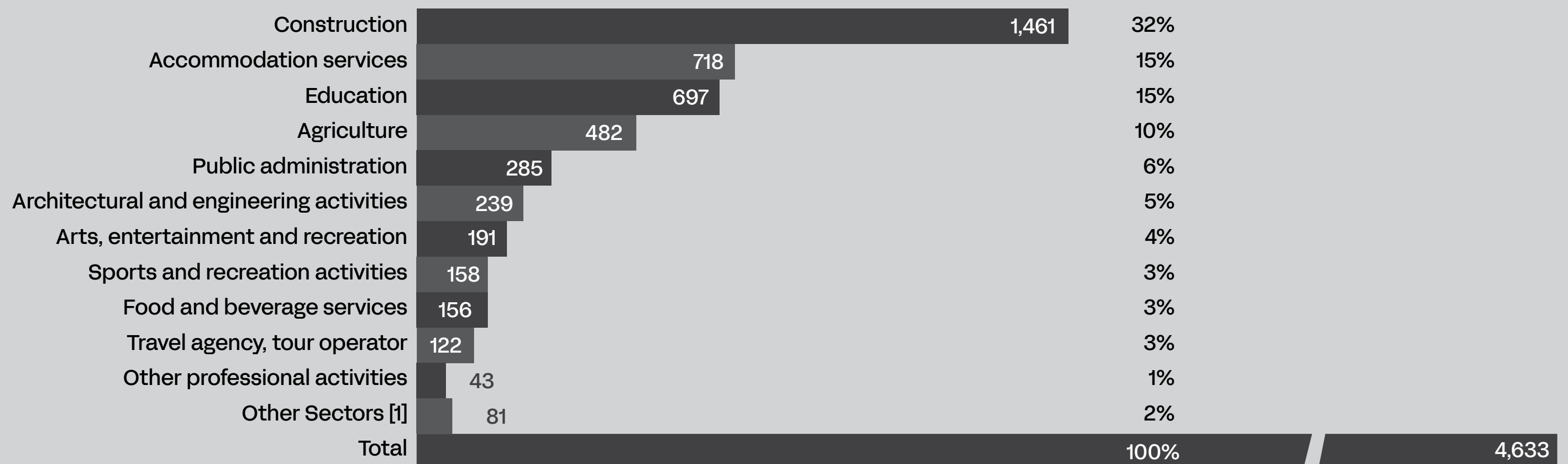
The heritage sector is estimated to contribute up to €4.6bn in economic output to the Irish economy.

The construction sectors makes the largest contribution to the heritage sector, at €1.5 billion in economic output through its direct, indirect and induced impacts. This contribution largely arises from maintaining and restoring heritage sites using traditional crafts like stonemasonry, carpentry, joinery, bricklaying, blacksmithing, plastering, thatching, roofing, tiling, and decorating.

Economic impacts from the heritage sector across the different sectors

The Heritage Sector's Total Economic Output (€m),
Total €4,633 million

Share of Heritage
Sector's total value



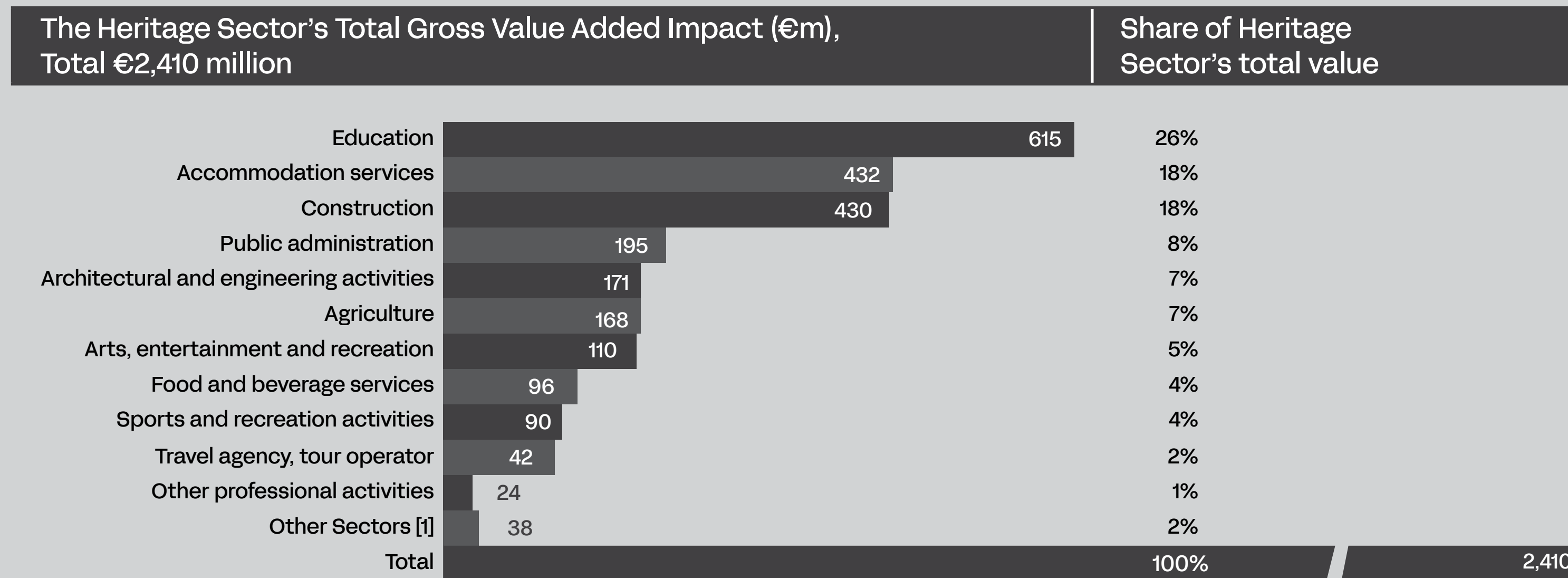
Notes: [1] Other sectors is made up of scientific research & development, advertising & market research, water transport, and repair & installation of machinery and equipment
Source: [a] CSO [b] Stakeholder consultation [c] KPMG analysis

The heritage sector's total impact: *Gross Value Added*

The heritage sector is estimated to contribute up to €2.4bn in Gross Value Added to the Irish economy.

In terms of Gross Value Added Education makes the highest contribution to the heritage sector through the various levels, from primary to higher education. This includes learning about Ireland's rich history, culture, traditions and language, which helps in preserving and promoting national heritage.

Gross Value Added impacts from the heritage sector across the different sectors



Notes: [1] Other sectors is made up of scientific research & development, advertising & market research, water transport, and repair & installation of machinery and equipment
Source: [a] CSO [b] Stakeholder consultation [c] KPMG analysis

Economic impact of the Heritage Sector:

Employment

Jobs created



Direct employment

36,000



Indirect and induced employment

26,000



Total employment

62,000

In Ireland, the heritage sector provides ~62,000 jobs and ~€1.8bn of labour income on an annual basis.

Labour income (€m)



Direct labour income

€1,056m



Indirect and induced labour income

€700m



Total labour income

€1,756m

The analysis above highlights the heritage sector's jobs created and labour income in the Irish economy. The heritage sector contributes ~62,000 total jobs and ~€1.8bn of labour income directly and indirectly to Irish households.

The heritage sector's economic impact results

Employment

Lack of required data means employment granularity is not currently possible.

Effectiveness of the questionnaires

As mentioned earlier, 40 organisations and programmes associated with the heritage sector were issued questionnaires to gain additional information on heritage related employment, activities, investments and grants. Of these, the most important element of information that the questionnaires were intended to uncover concerned heritage related employment. Unfortunately, the response rate was very low for employment data.

Total questionnaires issued to organisations/programmes:	40
Total questionnaires issues where employment was asked about:	38
Comprehensive responses about employment:	5
Partial responses about employment:	13
At least partially answered questionnaires:	24

No professional body representing professionals that could be generally perceived to operate within the heritage sector were able to give an estimate as to the relevant number of full-time equivalent employees. Of the five comprehensive responses about employment, all were from relatively uncomplex organisations with a strong focus on heritage. From reading the various responses, it is evident that the relevant employment data is simply not being collected.

Hierarchy to enable workforce breakdown estimates

The four step methodology intended to gain the granularity concerning heritage related employment depended on a strong questionnaire response rate.

Step 1

Sector representative body asked estimates via questionnaires for those working in the sector.
Reality: none could provide estimates.

Step 2

Results from step 1 to be compared with specific numbers and general estimates obtained through questionnaires from other bodies an programmes in the same sector.
Reality: comparisons not possible due poor response rate.

Step 3

Results from steps 1 and 2 to be compared with insights obtained during first round of workshops and interviews.
Reality: some useful information obtained during workshops and interviews about the general size of various sectors but knowledge on job numbers was more vague.

Step 4

Results from steps 1, 2 and 3 compared against Census derived sectoral estimates.
Reality: sectoral estimates created via the model but little to compare against.

As a result of the lack of data, no granularity associated with heritage related employment is possible. Consequently, in this report we only provide overall estimates as to the number of jobs – directly and indirectly – associated with the heritage sector.

The heritage sector's economic impact results

An upward trajectory

Macro forces are likely to mean that the economic footprint of heritage will continue to grow.

Introduction

During research and consultation for this report it emerged that the economic impact of heritage is growing and is likely to continue to grow. The year 2022 to measure the impact of heritage on the economy was taken because it was the most recent year available with a strong set of economic data. We became aware of additional government and EU supports since 2022 not only for relevant heritage bodies but also for regeneration projects associated with heritage, more ecologically friendly farming practices and a national forestry programme with far greater focus on biodiversity than its predecessor that ended in 2022. Of course, direct government support for heritage could reduce if national finances come under pressure. Nonetheless, heritage's association with key government policies and EU programmes and macro trends means that over the mid and long term economic activity associated with heritage is projected to grow.

Climate change and biodiversity

The greatest of the macro trends is how we as a society address climate change and biodiversity loss. Ireland's national emissions reduction target is to reach net zero across all sectors of the economy by 2050, with a reduction of 51% by 2030. In 2024, the EU passed the Nature Restoration Law. This obliges all EU states, including Ireland to adhere to binding targets for the restoration of degraded ecosystems. Considerable investment in heritage is necessary to permit the necessary reduction in greenhouse gas emissions and landscape restoration. One recent example of the impact of policy change on heritage is the €3.15bn Climate and Nature Fund established by government in Budget 2024. At the EU level, CAP is also moving towards providing stronger incentives for climate and environment-friendly farming practices.

Another area where heritage is likely to benefit from climate action is in building reuse. There is growing focus on building reuse to retain the sequester carbon in the existing materials. This

will lead to greater building conservation activity in the construction sector. There is an estimated 175,000 structures in Ireland still standing now that date to before 1919. The vast majority of these are not legally protected under heritage legislation.

Community development and regeneration

Through several funding streams government has been putting substantial sums of money into rural and urban regeneration. The Rural Regeneration and Development Fund is a commitment by government to invest €1bn in rural Ireland between 2019 and 2027. It is complemented by the Urban Regeneration and Development Fund which has an allocation of €2bn to be spent on projects in Ireland's cities and large towns from 2018 to 2030. There are also other smaller funds that impact on urban and rural regeneration. In both the URDF and especially RRDF programmes much of the allocated money concerns heritage. For example, of the €164 awarded in May 2024 as part of RRDF to 30 regeneration projects, almost all had a significant heritage element. Most involved the reuse of an historic structure.

Cross-border connections

In 2020, the Shared Island initiative was established as a whole of government priority to build consensus with all communities and traditions across the island of Ireland. Heritage forms a small but important element to this initiative. Given the recent strengthening of relationships between Ireland and the UK, it is likely that there will be additional supports put into all-island heritage related projects. This will be done in an effort to build understanding and establish a shared – if somewhat contested – identity.

5

Case studies of the heritage sector's wider impact



The heritage sector's economic impact results

Stakeholder testimonials

Insights from key stakeholders
in the heritage sector and its
impact on the economy.

There is a need to fight for delivering a third level degree in the conservation of heritage in Ireland.

Professional Conservator
Accrediting Body

A significant number of the work carried out in the heritage sector is via community groups. This consist of people volunteering at archives, events, education, religious institutions, etc.

Archivist,
Irish University

There is need for more quantifiable data, especially regarding employment, to better understand the heritage sector's impact on the economy.

Head of Research,
Public Sector Entity

Heritage construction is not only about renovation and restoration of historic buildings, but also about new buildings that are associated with heritage sites, such as a visitor centre.

Architect,
Membership body

Heritage is more important than simple economics.

Heritage Professional,
Membership body

With increasing numbers visiting archaeological sites on the West Coast sites are deteriorating. There is a need for additional investment in the conservation of these sites to sustain the tourism.

Professional Conservator,
Accrediting Body

We need to look at how to conserve built heritage (and intangible heritage associated with it) with local communities managing them.

Professional Conservator
Accrediting Body

The economic value of heritage should also reflect the values and associations that make an object or a work unique and contribute to the national identity.

CEO,
Public Sector Entity

The records of today are the archives of tomorrow.

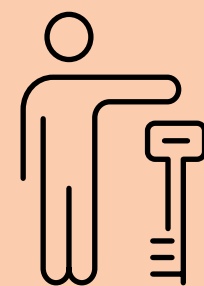
Archivist,
Irish University

The Viking Triangle generates a range of social and economic benefits for Waterford City.

The Viking Triangle

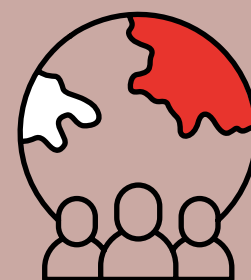
Overview

The Viking Triangle is a tourist proposition based around the location of the original Viking settlement. Developed as a nationally important heritage destination, it contains a campus of multi-award winning museums and historic buildings set in a high-quality public realm. Aside from attractions such as the Bishop's Palace, Theatre Royal and House of Waterford Crystal, it offers craft studios, bars and restaurants. In effect, a hospitality ecosystem has been created to the benefit of locals and tourists. The Viking Triangle is more than just a tourist destination, it is the cornerstone of wider regeneration efforts in the City.



Benefit to heritage

The ongoing success of the Viking Triangle has encouraged Waterford and City Council to continue investing in heritage properties both modest and grand.



Social benefits

The Viking Triangle has been at the core of wider urban regeneration efforts in the city. Since 2009 the city has been transformed. At least part of the reason why recent Pobal Deprivation Index scores for Waterford City have improved can be reasonably attributed to the Viking Triangle. The improvements in liveability are now recognised nationally and internationally as best practice. In 2021, the Irish Times announced that Waterford City was the Best Place to Live in Ireland. In 2017, the UK based Academy of Urbanism bestowed the Great Place Award on the Viking Triangle.



Economic benefits

Tourist engagement

In 2022, ~74,000 visitors visited the Waterford Treasures collection in the Viking Triangle [a]. Of these, almost six in ten were international visitors. The Viking Triangle is an important location for the city's main festivals (e.g. the Harvest Festival, Winterval, the Spraoi International Street Arts Festival).

Employment opportunities

The development and maintenance of the Viking Triangle and its museums creates jobs across sectors such as tour guides, event coordination, hospitality, retail, building conservation professionals, and archaeologists.

Revenue generation

The influx of visitors to the Viking Triangle boosts local businesses including hotels, restaurants and shops.

The Viking Triangle is located in Waterford City

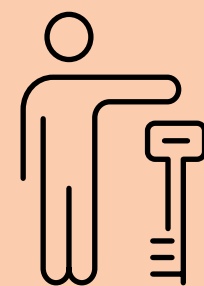


Heritage Week generates economic and social benefits on a local and national scale across Ireland.

Heritage Week

Overview

National Heritage Week is consistently one of the largest festivals in Ireland. It is an annual celebration of heritage coordinated by the Heritage Council that aims to promote awareness and appreciation of Ireland's rich cultural, natural and built heritage. In 2024, there was over 2,350 events held right across the country [a]. Although a large number of events in 2024 were put on by State agencies and local authorities, the majority were organised by enthusiastic, local volunteers.



Benefit to heritage

Heritage Week raises awareness about historic sites, natural landscapes, native plant and animal species, and the unique traditions and practices that make places distinct. By doing this, it is creating heritage advocates out of attendees, and in turn ensuring that the various elements of heritage endure.



Social benefits

Heritage Week brings communities together. Most people attending a typical event come from the immediate area. By learning more about their home, their sense of belonging and well-being is increased. Neighbours are met and community cohesion is increased. Visiting museums and walking through a wood has benefits to people's mental and physical health. Similarly, volunteering has been shown to increase well-being of the volunteer.



Economic benefits

Tourist engagement and revenue

It is estimated that over 600,000 people typically attend Heritage Week [b]. Although much is leveraged from the work of volunteers and support provided by other State agencies and local authorities, the coordinating budget is a very modest. In 2023, it was €639k [c]. The national celebration of heritage attracts both domestic and international visitors each year to various heritage sites across the country. A visitor study commissioned by Youghal Medieval Festival calculated that the one-day festival held in 2023 during Heritage Week was worth in €863k to the local economy [d].

Employment

The event directly supports heritage educators, reenactors, stall holders at events and staff at various heritage attractions. There is also the associated spend from visitors in nearby shops and restaurants.

Heritage week takes place across all counties in Ireland

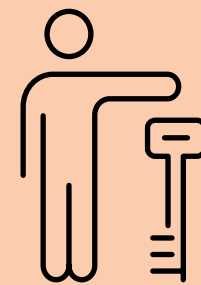


The scheme generates economic, social and heritage benefits on a local and national scale.

Traditional Farm Buildings Grant Scheme

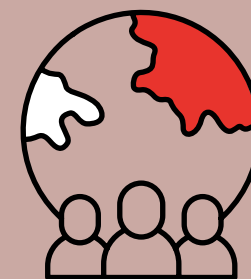
Overview

The Heritage Council, in partnership with the Department of Agriculture, Food and the Marine, manage the Traditional Farm Buildings Grant Scheme. The key objective of the scheme is to ensure that traditional farm buildings and other related structures that contribute to the character of the landscape and are of significant heritage value are conserved for active agricultural use. Since beginning in 2008, over 1,000 traditional farm buildings have been repaired or restored [a]. In 2024, the scheme won the prestigious European Heritage Award / Europa Nostra Award.



Benefit to heritage

The repairs support the continuation of traditional skills not only by financially supporting craftspeople but also through the transfer of knowledge from craftspeople to farmers. Care is taken to support wildlife using the buildings as habitats. The work allows the structure to endure for another century or two. Associated fittings and artefacts are safeguarded.



Social benefits

An extraordinary success of the scheme has been in changing attitudes surrounding vernacular heritage and traditional skills. On an informal level, the scheme facilitates the transmission of skills from generation to generation, with the whole family often getting involved in conservation works. The conserved buildings improve the visual quality of the rural landscape in which they are located. In a 2022 survey of participating farmers, 100% said their farm looked better and they were prouder of it.



Economic benefits

Employment opportunities

The scheme aims to support local employment by funding conservation projects that required skill labour across a range of jobs such as carpenters, masons and tradespeople more generally-grant amounts vary between €4,000 and €30,000. In 2023, €1.25m was expended on the scheme.

Sustainable agriculture

The scheme ensures that traditional farm buildings and other related structures remain functional and conserved for active agricultural use. This supports sustainable farming practices and increases farm productivity. 70-80 projects are supported annually.

Farms across all counties in Ireland have been supported under the Traditional Farm Buildings Grant Scheme

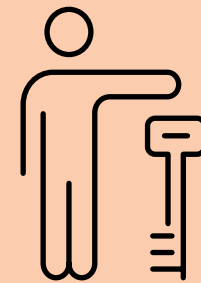


BIPG generates a range of economic and social benefits for Bere Island's population .

Bere Island Projects Group (BIPG)

Overview

The Bere Island Projects Group has been active on Bere Island since 1987 [a]. It is a community group that serves the people of Bere Island by working to sustain the island population through the creation of employment, promoting community initiatives and supporting local businesses and community groups. BIPG employs three full-time staff and one contractor and is run by an elected voluntary committee drawn from the permanent resident population [b]. Staff work from offices adjacent to the island community centre. BIPG is also tasked with providing community development support to Whiddy Island and Dursey Island.



Benefit to heritage

BIPG has a strong focus on the conservation of the island's built, cultural and natural heritage. This is guided by the Bere Island Conservation Plan. Considerable work has been accomplished, especially with the island's impressive military heritage. The island is an example of how heritage can be used to support the economic and quality of life of rural communities.



Social benefits

The BIPG seek to use the natural, built and cultural heritage strengths of the island to improve the quality of life for residents and develop economic opportunities. The community have been very active in making sure living on the island is culturally and socially dynamic. In 2023, the inaugural Bere Island Arts Festival was held. A year later, the Storytelling Festival was created. The Bere Island Water Sports Club was established in 2015. In 2022, the population of the island was roughly the same as it was when counted for Census 1986 [d]. In 2024, the student level at the island's national school was 23. This was the highest it had been in recent years.



Economic benefits

Employment opportunities

BIPG focuses on creating job opportunities in order to sustain the island's population. Activities include the preservation and development of the island's World War One military fortifications as visitor attractions and assisting in arranging sustainable tourism events and festivals.

Sustainability

Being an island, energy and waste are ongoing concerns. The island is part of an EU initiative to transition to clean energy by 2030. This initiative aims to reduce energy costs by 20%, lower fuel bills and create jobs through home refitting and biomass fuel production. In 2023, BIPG took delivery of a new electric bus to support community groups on the island [c]. A charging point was also installed at the community centre which itself has PV solar panels and an air-to-air heating system. In 2019, the island's recycling centre was converted to run entirely on renewable energy.

The BIPG operates on Bere Island off the Beara Peninsula in west Cork

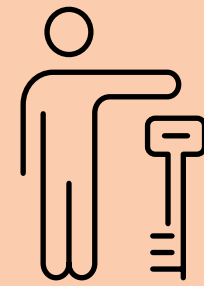


The scheme generates a range of economic and social benefits from bog preservation in the midlands.

The Enhanced Decommissioning Rehabilitation and Restoration Scheme (EDRRS)

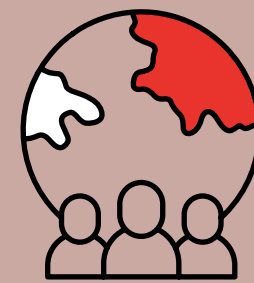
Overview

The Enhanced Decommissioning Rehabilitation and Restoration Scheme is an environment initiative aimed at restoring peatlands. By rewetting bogs, the scheme will protect the storage of 62-78 million tonnes of CO₂ emissions, enhance biodiversity, secure 350 jobs and contribute to Ireland's target of being carbon neutral by 2050[a]. Through the implementation of this scheme, it is estimated that over the period to 2050, ~3.2 million tonnes of CO₂ emissions will be avoided (via reduced emissions).



Benefit to heritage

The scheme covers roughly 33k hectares of peatland previously harvested for industrial peat extraction. The rehabilitation of this land will significantly enhance habitats of native flora and fauna and support Ireland's Biodiversity Action Plan.



Social benefits

The main benefits of bog rehabilitation are reducing carbon emissions from peatlands, securing these and creating improved habitats for flora and fauna. Bog rehabilitation also improves local landscapes for people, creating new habitats in places where there was former industrial use. Healthier bogs will reduce the risk of flooding and improve water quality. Landscapes with rehabilitated bogs can become places to explore and interact with nature, as well as our industrial and archaeological heritage, thereby enhancing well-being. Finally, these areas can be used as outdoor classrooms to learn more about nature and climate.



Economic benefits

Employment opportunities

The scheme is expected to secure 350 jobs in local communities across the midlands [b]. The scheme aims to provide new job opportunities for workers transitioning from peat extraction and support other eco-tourism initiatives.

Economic diversification

The scheme supports the re-skilling of workers and helps small to medium sized enterprises (SMEs) to expand and create new opportunities. Diversification can play a key role in the economic stability of local communities that were previously dependent on peat harvesting.

The EDRRS applies to bogs in the midlands of Ireland.

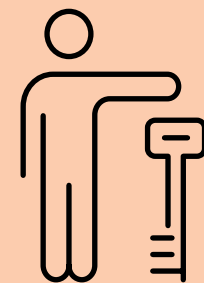


Nano Nagle Place generates a range of economic and social benefits to the people of Cork.

Nano Nagle Place

Overview

Nano Nagle Place is a unique heritage site dedicated to the life and legacy of Nano Nagle, an 18th century nun who founded the Presentation Sisters. In 2017, the 3.7 acre site in the middle of Cork City was transformed from a convent into a multiuse place incorporating restored buildings and gardens, the MTU/UCC Centre for Architectural Education, meeting rooms, a museum, café and shop [a]. The site still functions as a convent. Indeed, the redevelopment adheres to Nano Nagle's ethos of serving the community and the power of education.



Benefit to heritage

Nano Nagle Place illustrates how heritage can be made relevant for a modern audience. The integration of new and old elements in the redesign provides a best practice example for others to follow. The museum won the 2022 Council of Europe Museum Award.



Social benefits

The site houses several community-focused organisations such as The Lantern, Cork Migrant Centre and the Men's Group. These groups work to support and uplift communities in Cork. Nano Nagle Place offers spaces for community and charity groups, promoting social inclusion and collaboration among a range of groups and communities. The site hosts various events, workshops and educational programmes throughout the year, making it a vibrant community hub.



Economic benefits

Tourism revenue

As a significant cultural and historical site, Nano Nagle place attracts numerous domestic and international visitors. During 2023, over 85,000 people visited Nano Nagle [b]. In 2019, 10,000 paid to visit the museum. The influx of visitors to the site boosts local businesses such as hotels, restaurants and shops.

Employment opportunities

The operation of Nano Nagle Place creates jobs in various sectors, including museum staff, gardeners, café and deli workers, shop staff and administrative roles which provides job opportunities for the local economy.

The UCC/MTU Centre of Architecture Education is located at the west end of the site. It hosts teaching and administration staff. The presence of staff and students supports nearby hospitality businesses.

The BIPG operates on Bere Island off the Beara Peninsula in west Cork





6

What next? Recommendations for further research

Key recommendation concerning data

The need to have a more comprehensive approach to data creation and collection.

Measuring the impact of heritage and associated employment

It became obvious during the project that the creation and collection of data in the heritage sector related to economic impact was poor.

For example, although records of heritage related grants/financial supports were easy to find, the tracking of the employment and economic impact of the funding varied considerably. Funders operated largely independently. Adding complexity to establishing the flow of money and associated employment

were the presence of non-heritage bodies ostensibly funding projects with a heavy heritage aspect (e.g. converting a historic structure into a enterprise hub). Furthermore, there is a proliferation of relevant grant schemes and supports – big and small – which are created, modified or wound up at a high frequency. Consequently, the financial support landscape for heritage is rarely the same from year to year.

Of far greater concern to our knowledge of the economic impact of heritage was the counting and mapping of heritage related employment. No professional body representing professionals that could be generally perceived to operate within the heritage sector were able to give an estimate as to the relevant number of full time equivalent employees. As a result, in this report we only provide an overall estimate as to the number of heritage related jobs. We could not provide numbers of full time ecologists, archaeologists, archivists, conservation architects, etc, because, that data is not collected.

Another aspect related to data collection was the social impact of heritage. The social value of heritage frequently came up during consultation for this report. However, it is not comprehensively quantified or analysed. To address these fundamental knowledge gaps we recommend that a research unit be created that would continuously measure the economic and social value of heritage, and map heritage related employment.

NACE language and heritage

Create a research unit that would continuously measure the economic and social value of heritage, and map heritage related employment. This unit could possibly be part of the Heritage Council as the statutory body with a heritage remit. The Heritage Council has strong experience in heritage related research.



What next?

Recommended research: economics and beyond

Stakeholders emphasised the need for a holistic assessment of heritage's impact in Ireland.

The social value of heritage

In workshops, stakeholders emphasised the social value that heritage contributes within Ireland, including community cohesion, a sense of personal and national pride, and belongingness.

The social value of heritage

Heritage plays a core role in many of Ireland's most valuable brands. This is especially notable in food and beverage products (e.g. Kerrygold, Guinness, Jameson) but also plays a role in exporting Ireland's services overseas. This report explicitly excluded the branding value of heritage from its economic assessment. A separate research study would help to demonstrate the value that Irish firms receive from their use of Ireland's heritage in their branding.

The role of heritage volunteers

Stakeholders highlighted the extensive contributions from volunteers in the heritage sector. The nature of this report meant we focused on the economic impact of employees carrying out heritage related activities. We recommend that the Heritage Council also investigates the impact of volunteers in the heritage sector. This should consider both the value of their contributions and the positive impact that volunteering has on the individuals involved.

Natural capital

Heritage provides a number of ecological services (e.g. pollination of crops, flood defences) of direct benefit to Ireland's economy. They also bring wider services of benefit to communities (e.g. clean air) and individuals (e.g. recreation spaces that aid personal physical and mental health). The social benefits also have positive economic outcomes (e.g. greater productivity). Investment to preserve and restore the natural landscape helps both to improve the quality of that

landscape and to support the public's quality of life. Furthermore, appropriate investment in the natural environment is also vital to addressing the interlinked issues of biodiversity loss and climate change.

Ireland does not currently publish supply and use tables for natural capital. Once these tables become available, the Heritage Council should assess the heritage sector's role in preserving and improving Ireland's natural capital.

The regional distribution of heritage activity

This study produced figures representing heritage activity across the Republic of Ireland. The nature of this analysis means it is not possible to calculate indirect/induced economic impact or economic multipliers at a sub-national level. However, it would be possible to calculate the direct economic output from heritage activities at regional and, potentially, county or electoral division level.

What next? Potential further research topics

Regular research is needed to illustrate the relevance of heritage and improve its strategic use.

The economic value of the heritage sector

- Accurately understand heritage associated employment
- Regional and county scale studies on the economic impact of heritage
- Structural importance of heritage to the agriculture sector (e.g. brand value)
- The role of heritage in “Brand Ireland” and attracting foreign investment
- The role heritage plays in the retail sector
- Incorporating heritage via social value into cost benefit analyses

The contribution of heritage to the visitor economy

- Structural importance of heritage to the tourism sector

Heritage and creativity

- Structural importance of heritage to the arts sector
- Heritage’s role in artistic, scientific and economic creativity

Education

- The use of heritage as a tool for education

Health and well-being

- The role of heritage in mental and physical health
- The role of heritage in general well-being
- The benefits of volunteering in heritage related activities and growing the level of interaction
- The social value from interacting with heritage

Heritage and its role in development and place

- The role of heritage in the development of community spirit in Ireland’s communities
- How heritage can be better used to create community cohesion and integrate new arrivals into the country
- Impact of heritage on the real estate market
- Heritage and the connection with beauty premium in Irish towns and cities
- The role of heritage in place making and place-shaping

Climate change and biodiversity

- The economics of building reuse in Ireland
- The central or local government fiscal measures and policies needed to help prevent historic buildings from becoming redundant and vacant
- How natural and traditional building materials and techniques can be scaled up to meet modern demands for new buildings and existing structures
- The value for money provided by environmental services (e.g. pollination, flood defences)
- Commercial opportunities in farming for nature
- How heritage can better support the circular economy

Heritage labour market / workforce intelligence

- Expertise gaps, including necessary skills for the future economy
- Traditional skills gaps and the actions needed to address these
- Creating a methodology to collect heritage related employment data



7

Appendix A

Technical notes and assumptions

Model overview

A modified Input-Output (I-O) table based on CSO's 2020 symmetric I-O table is the base of the analysis.

Model overview

The well-established input-output analysis methodology has been used to create a model for calculating the value of the heritage sector. The first step was to use the 2020 Supply and Use Tables (Symmetric I-O tables) to facilitating an in-depth examination of inter-product utilisation within the Irish economy. A modified I-O table is calculated with the help of a through the following process:

- Weighing Matrix which includes the proportion of output in each sector associated to heritage related activities. These weighting were determined from publicly available data and stakeholder consultations.
- The requirements matrix, which explains the direct input requirements per unit of output is first calculated. This includes:
 - Weighing Matrix which includes the proportion of output in each sector associated to heritage related activities. These weightings were determined from publicly available data and stakeholder consultations.

- The requirements matrix, which explains the direct input requirements per unit of output is first calculated. This includes:

- At its core, an I-O model is comprised of a system of linear equations, where each equation represents the distribution of an industry's output across the economy.
- Utilising matrix algebra, these linear equations with unknowns can be easily represented and efficiently solved using matrix inversion techniques.
- The Leontief inverse matrix provides a framework to compute the final multipliers for designated sectors, encapsulating both direct and indirect effects within the economy.
- Variations are used to calculate induced multipliers.

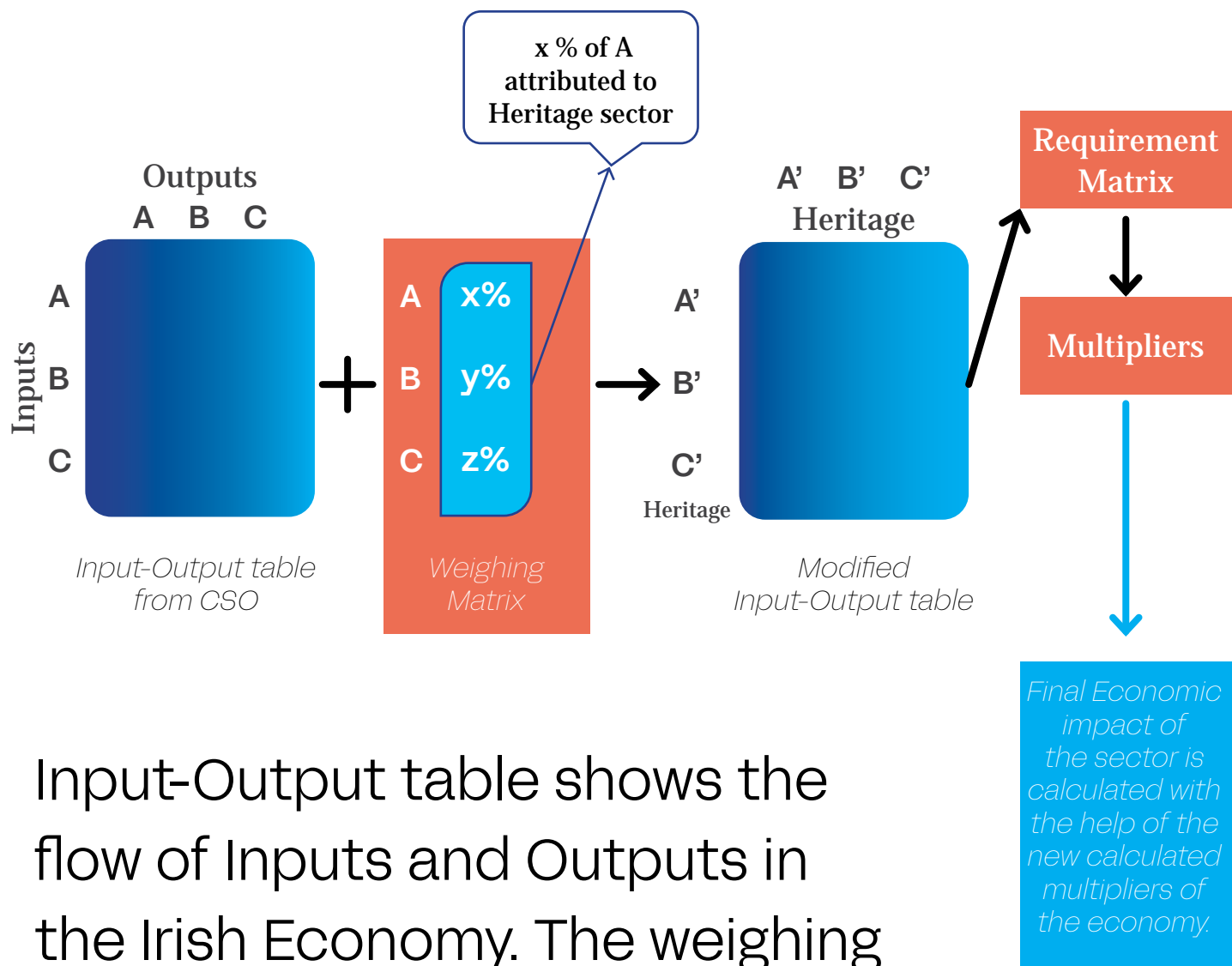
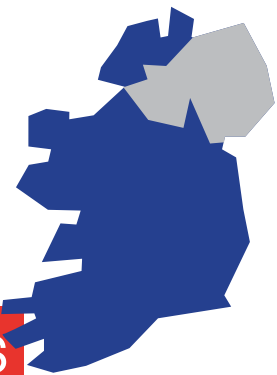
This sophisticated analytical approach allows for a comprehensive understanding of the economic interrelationships and the propagation of demand shocks through the production network.

Calculating Employment in Heritage

- The 2022 Irish Census data was used to calculate the number of jobs per unit of output in each sector and estimate the total direct jobs related to heritage by factoring in sector-specific spending on heritage activities.
- Multipliers were then applied to determine overall spending and estimate the total number of heritage related jobs.
- The difference between total and direct jobs reflects the number of indirect jobs.
- Benchmarking was then undertaken against the Economic Value of Ireland's Historic Environment (2011) and The Economic Value of the Heritage Sector - Historic England (2022).

Model overview (2/2)

A visual representation of the model with intermediate steps



Input-Output table shows the flow of Inputs and Outputs in the Irish Economy. The weighing Matrix reconstitutes the Input-Output table to include Heritage related activities as a separate sector.

Sector weightings

Publicly available data and consultations have been used to determine heritage's share across a range of sectors.

Sector [1]	Percentage allocated to Heritage	Total output, €m (2022)	Output allocated to Heritage, €m
Construction	2%	34,754	695
Accommodation services	10%	4,126	413
Education	3.5%	13,465	471
Agriculture	1.75%	13,695	240
Public administration	1%	18,716	187
Architectural and engineering activities	3%	4,900	147
Arts, entertainment and recreation [2]	5%	2,104	105
Sports and recreation activities	5%	1,777	89
Food and beverage services	1%	9,201	92
Travel agency, tour operator	4.5%	1,398	63
Other professional activities	1.25%	1,930	24
Other sectors	0.5%	-	48

The above weightings is for the top 10 sector allocated to the heritage sector and have been we have determined from public information, surveys, workshops, and consultations. A conservative approach has been undertaken in regards to these weightings.

Notes: [1] Nomenclature Statistics on the European Activities of the European Community
[2] Please see economic language note on p.21.

Source: [a] CSO

Sector calculations assumptions (1/5)

Sector	Assumptions
Construction	<p>For this analysis 2% of the construction sector’s annual spend has been allocated to heritage. This percentage includes the following:</p> <ul style="list-style-type: none">• Maintaining and restoring heritage sites using traditional crafts like stonemasonry, carpentry, joinery, bricklaying, blacksmithing, plastering, thatching, roofing, tiling, and decorating• Use of key stakeholder information such as OPW employment (~284 in National Monuments Depots and ~155 in Building Management Systems depots employees and €631 million expenditure on estate portfolio management during 2022• Over 40 business registered with the Registered of Heritage Contractors <p>Other information and assumptions to note:</p> <ul style="list-style-type: none">• Benchmarks from similar research, such as England studies identified heritage made up 5% - 6% of construction sector and value chain spend• A lack of information on the exact number of construction employment that relate to heritage activities, but it is expect it to be between 1 – 3% of the sector
Accommodation	<p>For this analysis, 10% of the accommodation services sector’s annual output has been allocated to heritage. This percentage includes the following:</p> <ul style="list-style-type: none">• Hotels and similar accommodation located in heritage buildings, Holiday and other short-stay accommodation. There are close to 100 heritage hotels and wedding venues (i.e. in a historic building and/or area of natural beauty). Majority of which are 4 and 5 star hotels.• Camping grounds, recreational vehicle parks and trailer parks located close to heritage locations.• Assumed 50% of the turnover for camping grounds, recreational vehicle parks and trailer parks to be related to heritage activities.• Assumed 20% of the turnover for holiday and other short-stay accommodation to be related to heritage activities.• Assumed 8% of the turnover for hotels and similar accommodation to be related to heritage activities.• Excluded other accommodation (student residences, school dormitories, workers’ hostels, and rooming & boarding houses)

Sector calculations assumptions (2/5)

Sector	Assumptions
Education	<p>For this analysis 3.5% of the education sector’s annual output has been allocated to heritage. This percentage includes the following:</p> <ul style="list-style-type: none">• Ireland’s education system integrates heritage education at various levels, from primary to higher education. This includes learning about Ireland’s rich history, culture, natural landscape, traditions and language, which helps in preserving and promoting heritage• Primary school: ~16% of a teacher’s time is dedicated of Irish related education• Secondary education: ~13% of a teacher’s time is dedicated of Irish related education• Higher and other education: ~3% of a higher education is dedicated of Irish related education <p>Other information and assumptions to note:</p> <ul style="list-style-type: none">• Education support and pre-primary education have been excluded
Agriculture and Forestry	<p>For this analysis 1.75% of the agriculture sector’s annual output has been allocated to heritage. This percentage includes the following:</p> <ul style="list-style-type: none">• Agriculture has shaped virtually all of Ireland’s rural landscape, creating the iconic patchwork of fields, stone walls, and farmsteads that are integral to the country’s cultural heritage.• For this analysis we have assumed the funding used to protect and preserve the natural landscape contributes to the heritage including:<ul style="list-style-type: none">• Budget 2022 Farm Schemes: Green, Low-carbon Agri-Environment Scheme (GLAS), Areas of Natural Constraints (ANC), Traditional Farm Buildings Grant Scheme, etc• NPWS Farm Plan Scheme: The National Parks and Wildlife Service (NPWS) <p>Other information and assumptions to note:</p> <ul style="list-style-type: none">• The value from livestock raised in the agriculture sector has been excluded from this analysis.• Fishing has been excluded from this analysis

Sector calculations assumptions (3/5)

Sector	Assumptions
Arts, Entertainment, and Recreation [1]	<p>For this analysis 5% of arts, entertainment, and recreation sector's annual output has been allocated to heritage. This percentage includes the following:</p> <ul style="list-style-type: none">Arts and entertainment activities with heritage at their core. This economic impact, funding and support for museums, galleries, and historical sites, ensuring that cultural heritage is maintained and accessible to the publicAssign 100% of libraries, archives, museums and other cultural activities contribute to heritageAssumed ~20% of all creative, arts and entertainment activities relates to heritage <p>Other information and assumptions to note:</p> <ul style="list-style-type: none">Key items excluded is gambling which is included as part of this sector in CSO input-output tables statistics.
Public Administration	<p>For this analysis 1% of the public administration sector's annual output has been allocated to heritage. This percentage includes the following:</p> <ul style="list-style-type: none">Public sector staff working in heritage across the various government departments, local authorities, and state agencies including but not limited to:<ul style="list-style-type: none">Dept. of Housing, Local Government and Heritage; Dept. of Education; Dept. of Further and Higher Education, Research, Innovation and Science; Dept. of Tourism, Culture, Arts, Gaeltacht, Sport and Media; Department of Rural and Community Development; Dept. of Agriculture, Food and the MarineHeritage Council; OPW; Arts Council; Environmental Protection Agency; Fáilte Ireland, Marine Institute; Transport Infrastructure Ireland; Solas; Sustainable Energy Agency of Ireland; Teagasc, Údúrá na Gaeltacht; Foras na GaeilgeThe Loughs and Lights Agency; Waterways Ireland; Tourism IrelandNational Library of Ireland; National Archives, National Museum of Ireland; National Gallery of Ireland; Chester Beatty Library; Irish Museum of Modern Art; National Concert Hall; Crawford Art GalleryLocal Authorities (all 31)

Notes: [1] Please see economic language note on p.63.

Sector calculations assumptions (4/5)

Sector	Assumptions
Tour Operator and Reservations	<p>For this analysis 9% of the travel agency & tour operator sector's annual output has been allocated to heritage. This percentage includes the following:</p> <ul style="list-style-type: none">Tour operators and other reservation services play a crucial role in the heritage sector by facilitating access to heritage sites and cultural experiences.For this analysis we have assumed the share of turnover related to heritage activities in each sub-sector:<ul style="list-style-type: none">Assumed 80% of the turnover from tour operator activities within the country to be related to heritage activities.Assumed 6% of the turnover from other reservation service and related activities to be related to heritage activities. <p>Other information and assumptions to note:</p> <ul style="list-style-type: none">Excluded travel agency activities.
Architectural and Engineering	<p>For this analysis 3% of the architectural and engineering sector's annual output has been allocated to heritage. This percentage includes the following:</p> <ul style="list-style-type: none">Architecture is closely related to heritage activities as it involves the preservation, restoration, and adaptive reuse of historical buildings and sites.Assumed 5% of the turnover from architectural services to be related to heritage activities.Assumed 2.5% of the turnover from engineering services and related technical consultancy activities to be related to heritage activities. <p>Other information and assumptions to note:</p> <ul style="list-style-type: none">Key sub-sectors excluded are engineering activities and related technical consultancy and technical testing and analysis.

Sector calculations assumptions (5/5)

Sector	Assumptions
Other Professional Services	<p>For this analysis <u>1.25% of the other professional services sector's annual output</u> has been allocated to heritage. This percentage includes the following:</p> <ul style="list-style-type: none">• There is a number of other professional services that contribute to the heritage sector including but not limited to; archaeologists, conservation & restoration, surveyors, ecologists, photographic, translation and interpretation activities etc• Assumed 5% of the turnover from translation and interpretation activities to be related to heritage activities• Assumed 5% of the turnover from specialised design activities to be related to heritage activities• Assumed 1% of the turnover from other professional, scientific and technical activities to be related to heritage activities
Food and Beverage Services	<p>For this analysis <u>1% of the food and beverage services' annual sector's annual output</u> has been allocated to heritage. This percentage includes the following:</p> <ul style="list-style-type: none">• Food and beverage services play a crucial role in the heritage sector by offering visitors a taste of local cuisine, which is often an essential part of cultural heritage. These services enhance the overall experience of visiting heritage sites thereby preserving and promoting culinary heritage.• Assumed 5% of the turnover from restaurants and mobile food service activities to be related to heritage activities e.g. meals in a heritage buildings or locations. <p>Other information and assumptions to note:</p> <ul style="list-style-type: none">• Key sub-sectors excluded are beverage serving activities and catering activities

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