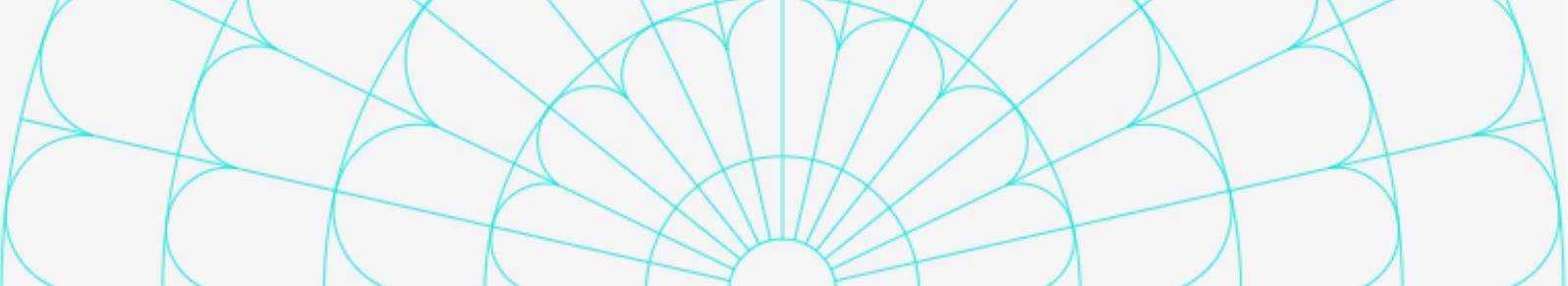


Heritage Index Technical Appendix

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About the Heritage Index

The Heritage Index is designed to support local communities, councils, heritage practitioners and heritage organisations to understand heritage in their local area and to make informed decisions. It is a collation of a large range of data sources which, in combination, paint a broad picture of local heritage. The data is used to create a heritage ranking, that is a relative measure of the heritage assets and activities in each local authority compared to another.

This technical report brings together relevant information from the technical report accompanying the first iteration of the Heritage Index on design and rationale, alongside up to date information on methodological changes and variable information.

It is intended to support understand and analysis of the Heritage Index and we recommend that when carrying out any detailed analysis of the data, reference to the key points in this appendix are made.

Much of the data collected for the Heritage Index is disparate, collected independently and hosted on different organisational websites. Whilst all of this data is publicly available, either already published or accessible by request, its original presentation offers little opportunity to analyse data from multiple sources together or to support collaboration.

The Heritage Index does the heavy lifting on this data, with the RSA downloading, cleaning, collating and updating a range of data points from national datasets, large and small heritage organisations and from advocates of different areas of the sector.

Data is collected at a local authority level, from all four nations, and organised into assets and activities across seven heritage domains¹:

- Historic built environment
- Landscape and natural environment
- Parks and open spaces
- Museums, archives and artefacts
- Industrial heritage
- Cultural and memories
- General

Data is weighted and a score is calculated for each local authority within each domain. A final score is calculated by weighting domain level scores. The final Heritage Index rank is a ranking of these scores at the local authority level.

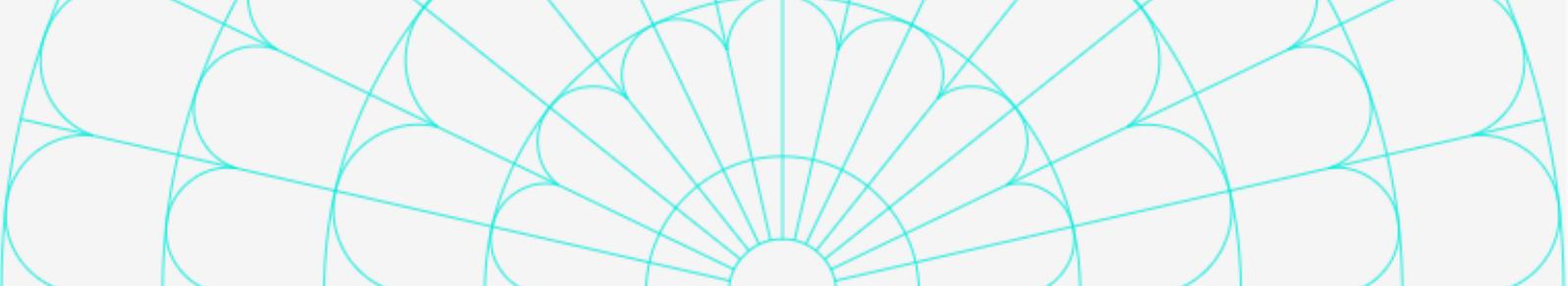
Additionally, a heritage potential score is calculated by comparing a weighted total of all assets and activities within each local authority. Areas which rank more highly across assets than activities have a higher heritage opportunity ranking.

¹ These domains are aligned with the National Lottery Heritage Fund priority areas. More information can be found at: www.heritagefund.org.uk



This report predominately features commentary and analysis on data from the Heritage Index for England, though reference is made to relevant data from Scotland, Northern Ireland and Wales. The data in each of the four nations does differ and so comparison between them should not be made.

The full Heritage Index ranking and raw data for England, Northern Ireland, Scotland and Wales is available for download from the RSA website, alongside a 'how to guide' for using the Heritage Index.



Work to date: designing the Heritage Index

Heritage Index criteria for data

1. Quantifiable

Many aspects of heritage are qualitative, for example the attractiveness of an urban street or a rural view which remains similar to that which would have been evident in previous centuries. However, you can't put a number to measure attractiveness. Instead, we rely on indicators such as the proportion of urban areas covered by conservation areas, or the proportion of land which is part of a designated Area of Outstanding Natural Beauty. In effect, these indicators are based on a judgement about quality, justifying the protection being introduced.

2. National coverage

So that the index scores would not unfairly discriminate against places for which data did not exist. For example, Bristol has mapped all of its public sculptures as part of the Know Your Place initiative. Most places, however, don't have this data, or don't publish it or even hold it in an accessible format; however most towns do have a public sculpture.

3. Up to date

Nothing older than five years.

4. Clearly 'directional'

Where it would be commonly considered that a higher number or concentration would be better. For example, having a relatively high number of archaeological finds in your local area is assumed to represent greater historic activity, as well as greater contemporary efforts to explore the past.

5. Related to a place

For example the listed location for most professionals in heritage crafts will be a business address (often, for the self-employed, their home address). This therefore provides a poor representation of the geography of where their skills are deployed, the location of their projects, or the historical origin of their craft.

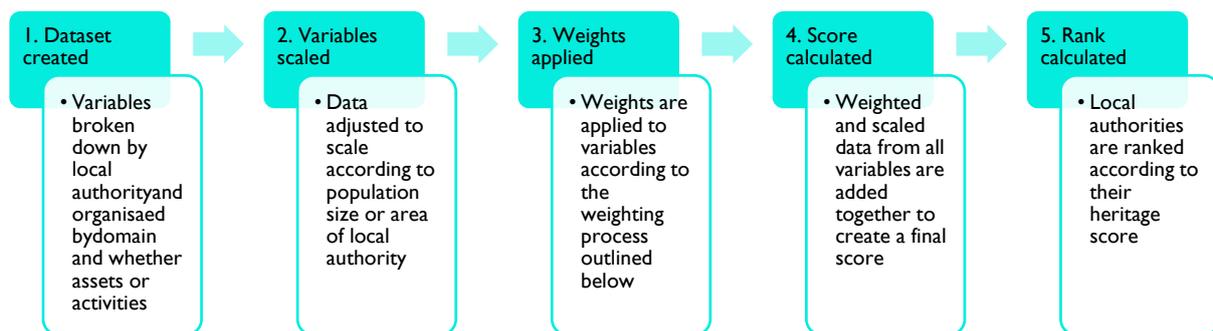
The first iteration of the Heritage Index sought to quantify the 'strength, breadth and depth of heritage at a local level, allowing for comparisons between places'. Collating this data required the RSA to review existing data in line with a number of criteria.

This year, an emphasis was placed on creating a comparable dataset. Much of the process for this iteration of the index, therefore, included updating and collating already established variables. More information on the methodological decisions in previous iterations of the Heritage Index can be found on the [RSA website](#).



Next, a new dataset was created that contained all local authority data for all variables, organised by heritage domain and whether the data represents an asset or activity. This dataset is available for download from the RSA website.

In general, a five-step process is used for calculating the Heritage Index overall ranking from the raw data:



For the sake of calculating the Heritage Index ranking, a number of weighting calculations are applied to the data to create a single measure. These weights include, in order:

1. Scaling the data within variables according to the size and population of the local authority to ensure that there was no inherent bias to larger or more populous areas.
2. Weighting data between variables within activities or assets of each domain according to the subjective importance of this variable to the domain.
3. Equally weighting asset and activity variables within each domain.
4. Equally weighting all domains – with the exception of the ‘general’ domain which receives a smaller weighting.

This series of calculations allows us to create the following scores (and by ranking them, the following indices):

- a. Domain specific assets rankings and domain specific activities rankings (applying weight 1. and weight 2.)
- b. Domain specific rankings (applying weights 1., 2. and 3.)
- c. Overall heritage ranking (applying all weights).

Weighting in this way does create some quirks in the data, however, on balance it provides a fairer comparison of the data between local authorities.

In particular, the Culture and Memories domain and the General domain include only heritage activities. Therefore, there are more domains with heritage activities (7) than heritage assets (5). This can mean that local areas which perform particularly well in either of these two domains are boosted as this performance is not diluted by any equivalent assets score in these domains.



The rationale for weighting

The overall score for a local authority is constructed using a composite of scores for each of the six domains of heritage, plus a seventh domain considered 'general' – relevant to the entire heritage sector.

Each of the six domains is weighted as 15 percent of the overall total, with 'general' accounting for the remaining 10 percent of the total score. Within each domain, 50 percent of the score for that domain is made up of a score which measures local assets, and 50 percent of the score for that domain is made up of a score which measures local activities.

The number of indicators which measure assets or activities varies – from three to 14 – depending on how many available datasets were obtained which met the criteria outlined above. However this does not affect the weighting for the domain, it simply means the domain score may be calculated on a wider basis.

Not all the data is treated as an equally weighted indicator in determining the domain score (and, by extension, the overall index score). Some measures are considered to represent more heritage value than others. For example, Grade I listed buildings are given a weight of twice the strength of Grade II* listed buildings, representing their status as heritage assets considered to have greater significance.

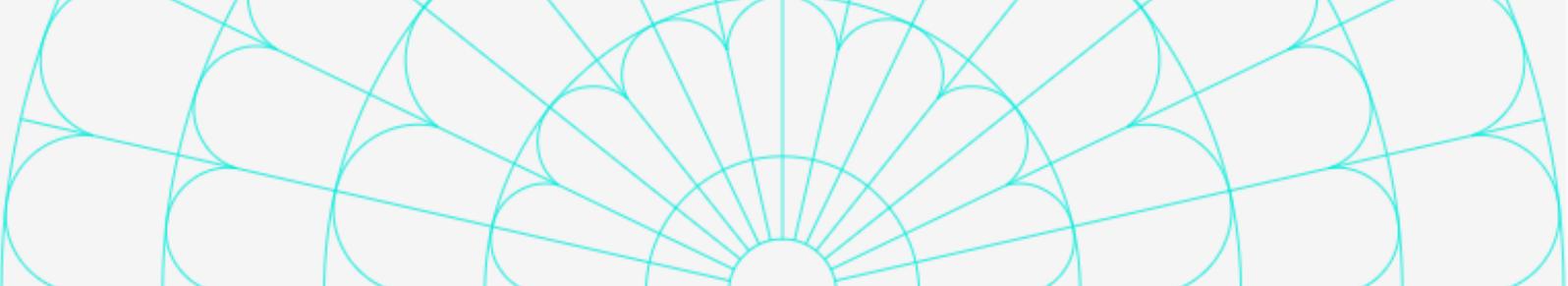
To compare data, which in its 'raw' form is measured in many different ways, data is adjusted into an index score based on whether a place is above or below the average for all local authorities.

This allows us to draw results together from across different indicators, which might measure the extent of a park in square kilometres or the size of a community group in terms of number of volunteers. Finally, for the index to successfully represent the strength of heritage in a given local authority area, results need to be adjusted once more, to account for the differences in size (land area) and residential population among local authorities.

The addition of this denominator effectively translates the index from a measure of overall heritage assets and activities into an index which – more usefully – measures the intensity or density of heritage assets and activities. Different indicators are adjusted by different denominators.

For example, landscape assets are converted into a per square kilometre measure, while museums are converted to reflect both their density per square kilometre and per resident in the district. The rationale is that such assets are rivalrous and that proximity matters to the utility of the asset. In other words, for every museum in a given land area, having more people depletes the value of the resource. For every museum for a given population, having it further away (located in a larger land area) depletes the value of the resource. Without this adjustment, heritage scores are largely a function of having a large land area (and thus capturing a high number of assets) and a large population (thus capturing a large extent of activities).

For London local authorities, daytime population figures are used, which include commuters (but exclude tourists). This reflects the fact that in many parts of London, the presence of heritage assets and activities is largely driven by the commercial function of the area, rather than a smaller residential function.



Changes since the last iteration

Local Authorities included

Since the last iteration of the Heritage Index a number of changes have been made to the local authority boundaries and names in England. These changes have resulted in an overall decrease in the number of local authorities in England, changing the lowest possible ranking from 327th to 316th.

These changes all came into effect in April 2019 and cover the following changes:

- The renaming of 'Shepway' to 'Folkestone and Hythe'
- The new local authority 'Bournemouth, Christchurch and Poole', which consists of the previous local authorities 'Bournemouth', 'Christchurch' and 'Poole'
- The new local authority 'Dorset' which consists of the previous local authorities 'East Dorset', 'North Dorset', 'Purbeck', 'West Dorset' and 'Weymouth and Portland'
- The new local authority 'West Suffolk' which consists of the previous local authorities 'Forest Heath' and 'St. Edmundsbury'
- The new local authority 'East Suffolk' which consists of the previous local authorities 'Suffolk Coastal' and 'Waveney'
- The new local authority 'Somerset West and Taunton' which consists of the previous local authorities 'West Somerset' and 'Taunton'

The Heritage Index uses the most up to date local authority names and boundaries. In instances where boundaries have changed, therefore, data is not comparable to previous iterations.

New variables

The RSA has included two new variables in this year's iteration of the Heritage Index, namely:

- Historic England data on creative businesses in conservation areas (in England and Wales)
- Ordnance Survey data on open spaces (in England, Scotland and Wales)

The Ordnance Survey data point is a critical point of expansion within the parks and open spaces domain.

Removed variables

Three variables have also been removed from the Heritage Index as they were either deemed to no longer be appropriate, or as they reflect activities that are no longer maintained. Weighting within domains has been amended to account for these removals and the introduction of the two new variables. These include:

- Resident Continuity (UK wide)
- Historypins (UK wide)
- Arts Council England Resilience Fund (England only)

Additional notes

The following outline points of note or changes in methodology from previous iterations of the Heritage Index. This is not a complete review of all data processes in the Heritage Index and instead intends to outline considerations for data users when working with the raw data.

- *Participation*

Much of the participation data for England is based on data from the Taking Part survey. This is a national survey which is one of very few sources that allows for comparable local authority level data. To ensure a minimum base size, we combine three successive years of data and take an average. Since the last iteration of the Heritage Index, this data has been discontinued at the local authority level. For this reason, the data included in this years' Heritage Index from Taking Part covers only until 2016/17.

- *Assets of Community Value*

Data on assets of community value is maintained by Keep it in the Community. Between iterations of the Heritage Index there has been an effort to update these records and, as such, some of the increase in the overall number of assets is related to improved records.

- *Neighbourhood plans*

In order to quantify neighbourhood plan activity at the local authority level, points are awarded to neighbourhood plans according to the progress that has been made towards them. This year the points awarded has been refined, with points being awarded according to the following system:

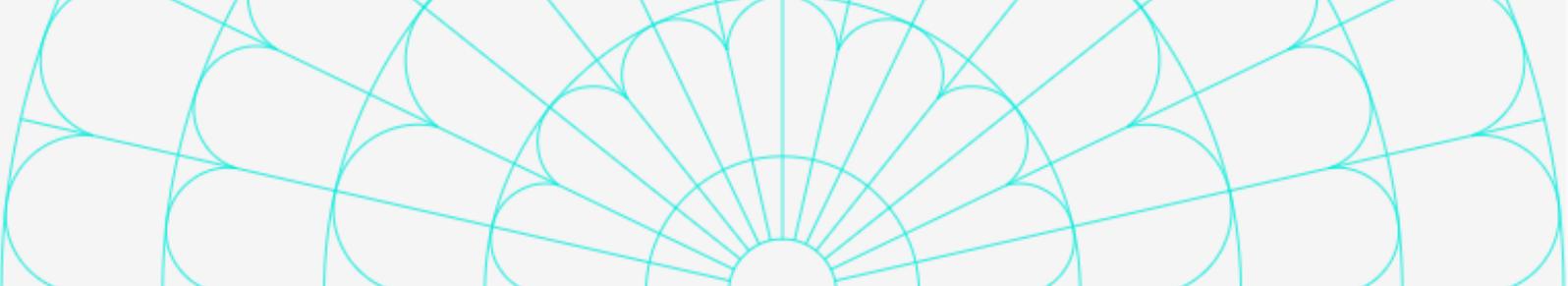
	Points		Points
Designating	0.1	Passed examination	0.5
Designated	0.2	Referendum	0.5
Pre-submission consultation	0.2	Passed referendum	0.5
Submitted for examination	0.5	Plan made	1

Each local authority's final points are a summation of all neighbourhood plans at any of the above stages. Plans made at the National Park Authority level have not been included in this data. The data is collated from informal monitoring of neighbourhood plans and therefore they may be some inaccuracies; individual local authority websites will include the most up to date and detailed information.

- *Historic Environment Records*

Historic Environment Records data for England and Scotland has been collated by individual request to local authorities. Some local authorities noted inconsistencies with data from the previous iteration of the Heritage Index which it is not possible to correct in data files from previous iterations. In particular some local authorities are in the process of digitising a backlog of records and therefore an increase in events or monuments from a previous iteration of the Heritage Index reflects improved data.

For local authorities that did not respond or were not able to provide this data, the average number of monuments and events has been imputed. Data may be collected differently



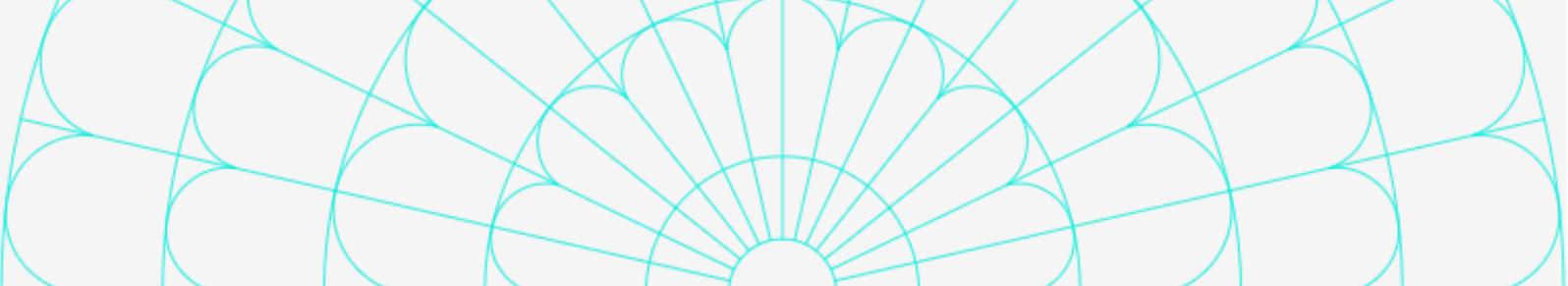
across local authorities, local authority HER and archaeological departments will be able to provide greater detail on their processes.

- *Archaeological finds*
Data on archaeological finds exclude finds for which there is not sufficient geographical information to assign the find to a single local authority.
- *Heritage businesses*
Data on heritage businesses is based on RSA analysis of Companies House data. Businesses are included from a specified list of SIC codes, which are active, and which have been for a period of at least 75 years. For the purposes of this year's data collection, this means businesses that were incorporated before 1st January 1944.
- *The Conservation Volunteers: volunteer organisations*
Not all TCV volunteer organisations data includes location information and therefore a number are not included in this year's data.
- *Heritage Sector Business Count*
Data on the number of businesses, employees and turnover within the heritage sector is collected by request from the Inter-Departmental Business Register, according to RSA SIC code definitions for the sector. The data included in the Heritage Index is the average over the last 3 years of published data, the full dataset for which can be found on the IDBR data requests website.
Data is redacted in some local authorities where the number of businesses or employees is below a minimum size to ensure the data remains unidentifiable. In these instances, estimates have been imputed based on average data across all local authorities.
- *Holiday nights spent*
It has not been possible to recreate the methodology used in the last iteration of the Heritage Index for the number of holiday nights spent in England. Therefore this year's data for this variable is not directly comparable to previous iterations.
- *Whiskey distilleries*
There has been a significant methodological change by the data provider in how the number of distilleries are calculated for this variable. Data included on whiskey distilleries in the Heritage Index for Scotland, therefore, is not comparable to previous iterations.
- *Areas of special archaeological interest and potential*
Data measurement for these variables in Northern Ireland has changed from number per local authority to hectares per local authority. This data is therefore not comparable to previous iterations.

In addition to these specific methodological notes and changes, data for a number of variables has not been updated and instead values from the last iteration of the Heritage Index have been included. This is due to a number of reasons, in some instances the data is no longer produced or collated, in others it was not possible to contact the data provider or access the data source. Note

this is different to variables where the data is maintained and accessible but there has been no change to the measure since the previous iteration of the Heritage Index. Variables for which it has not been possible to update the Heritage Index include:

England	Northern Ireland	Scotland	Wales
Churches open to the public	Churches open to the public	Churches open to the public	Churches open to the public
Museums (Accredited by Arts Council England)	European Route of Industrial Heritage Sites	Museum Galleries Scotland Recognised Collections	European Route of Industrial Heritage Sites
Museums (major partners Arts Council England)		European Route of Industrial Heritage Sites	Canals (metres)
European Route of Industrial Heritage Sites		Hedgerows	Canals under restoration (metres)
Canals (metres)			Parks and Gardens (Grade I)
Hedgerows			Parks and Gardens (all sites)
Perception of value of natural environment			Special Areas Conservation
Volunteering in the natural heritage			Hedgerows
Intangible cultural events			Civic Societies
Locality membership organisations			Number of holiday nights spent
Sightseeing, tours, viewing and visitor centres			



Interpreting the data

Key definitions

Heritage Index rank

The rank is the position of each local authority's Heritage Index score when listed from highest to lowest. The local authority ranked in 1st position has the highest Heritage Index score, for example.

Heritage Potential rank

Calculated as the difference in heritage assets ranking and heritage activities ranking. This is the opportunity within the Heritage Index to utilise assets.

Assets

Historic England define heritage assets as 'a building, monument, site, place, area or landscape identified as having a degree of significance meriting consideration in planning decisions, because of its heritage interest.

Activities

Heritage activities include a breadth of ways that local areas engage with tangible and intangible heritage assets. They span funding, volunteering, visiting heritage locations and other types of engagement.

Heritage domains

Heritage domains are how the Heritage Index categorises heritage, based on National Lottery Heritage Fund interest areas. Each of the six named domain makes up 15% of the final Heritage Index score, and a general domain makes up the final 10%.

Understanding heritage potential

The measure of heritage potential identifies areas where their heritage assets ranking outpaces their activities ranking. **That is, that there is a gap between the assets and activities.** It is these areas where they might be greater potential to engage with local assets, and by looking to areas that have a high heritage potential ranking we can understand where there might be scope for greater heritage activity.

Activities counted within the Heritage Index include funding streams – both from heritage funder organisations and local authorities – data on visitation to heritage sites and holiday nights spent in local authorities, participation in local decision-making (including neighbourhood plans), participation in heritage, archaeology and conservation clubs and volunteer groups, and more. Not all activity will



be captured in the Heritage Index due to the need for national coverage, but it does represent a number of formal and informal organised activities.

Not all local authorities will have heritage potential. Those areas where heritage activities rank more highly than their assets are making the most of their heritage assets according to this measure and their ranking reflects this.

In the heritage potential ranking, unlike the overall Heritage Index ranking, a higher ranking represents a local authority that is less efficiently using its assets. So, the highest-ranking local authority on this measure has the most potential.

Additional resources

The following resources are available from the RSA website:

- Full Heritage Index data for England, Northern Ireland, Scotland and Wales, including rankings and raw data
- A 'how to' guide for using the Heritage Index
- Interactive maps visualising the overall Heritage Index ranking
- A summary report, exploring findings and insights from this year's Heritage Index