

# HERITAGE COUNTS

## NORTH WEST – HERITAGE ECONOMY 2016

### HEADLINE FACTS

- Heritage directly contributed over **£922m in Gross Value Added (GVA)** in the North West in 2013
- In 2013, there were **over 17,500 people directly employed in heritage** in the North West.
- In 2014, heritage tourism **generated nearly £1.7 billion in spending by domestic and international visitors in the North West**
- Repair and maintenance of historic buildings in the North West directly generated **over £1.2b in heritage-related construction sector output** in 2015

### THE ECONOMY: NET IMPACTS

#### *Heritage is deeply embedded in the economy*

The historic environment is intrinsically linked to economic activity with a large number of economic activities occurring within it; dependent on it or attracted to it.

In 2016, Historic England commissioned TBR<sup>1</sup> to undertake a pioneering study that estimates the national and regional economic impact of the heritage sector annually. The study produces estimates of the heritage sector's impact using a method adapted from DCMS' Creative Industries Economic Estimates<sup>2</sup>. The workbook can be found on the Heritage Counts website ([www.heritagecounts.org.uk](http://www.heritagecounts.org.uk)).

#### *Heritage contributes to the generation of economic output*

Heritage directly contributed over **£922m in Gross Value Added (GVA)** in the North West in 2013<sup>3</sup>. This figure increases to nearly **£2 billion** when direct, indirect and induced heritage GVA is combined. This is equivalent to **1.4% of total GVA** in the North West.

Area	2011	2012	2013
TOTAL GVA (m) (Direct, Indirect and Induced)			
North West	£2,023.7	£1,969.5	£1,996.7
<b>% of total GVA for the North West</b>	<b>1.5%</b>	<b>1.4%</b>	<b>1.4%</b>
England	£ 21,363	£ 21,116	£ 21,697
<b>% of total GVA for England</b>	<b>1.7%</b>	<b>1.7%</b>	<b>1.6%</b>

<sup>1</sup> TBR (2016) Heritage Economic Indicator Workbook

<sup>2</sup> DCMS (2015) Creative industries Economic Estimates: Statistical Release

<sup>3</sup> TBR (2016) Heritage Economic Indicator Workbook

## *Heritage is an important employer in the North West*

In 2013, there were **over 17,500 people directly employed in heritage** in the North West. Including indirect and induced employment, this number increases to **over 35,000**. The number of people employed has declined since 2011 primarily due to a decline in heritage construction employment.

Area	2011	2012	2013
<b>Total Heritage employment (Direct, Indirect and Induced)</b>			
North West	38,900	36,300	35,000
<b>England</b>	<b>334,500</b>	<b>325,500</b>	<b>324,700</b>

## **THE ECONOMY: SECTORAL IMPACTS**

The TBR<sup>4</sup> 2016 study of economic impacts also produces estimates of the value of heritage tourism and heritage construction impacts.

### **Heritage Tourism**

#### *Heritage plays a key role in attracting international and domestic tourists*

In 2014, heritage tourism generated nearly **£1.7 billion in spending<sup>5</sup>** by domestic and international visitors in the North West<sup>6</sup>. In total, it is estimated that there were over 2m domestic overnight trips, 19m domestic day trips and 1.3m international visits to the North West in 2014.

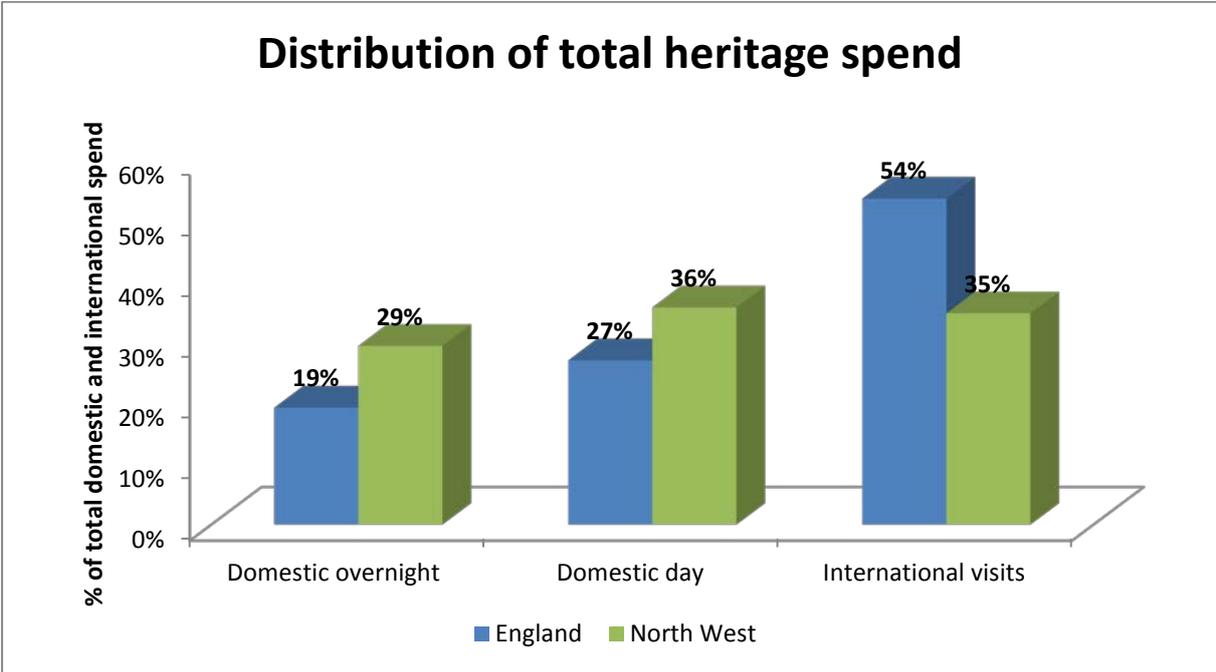
Heritage-related visitors (2014)	Heritage-related spend (£m)	Heritage-related trips/visits (m)
<b>Domestic overnight</b>		
North West	£488	2.16
<b>England</b>	<b>£3,549</b>	<b>15.94</b>
<b>Domestic day</b>		
North West	£592	19.0
<b>England</b>	<b>£4,978</b>	<b>156.43</b>
<b>International</b>		
North West	£576	1.30
<b>England</b>	<b>£9,856</b>	<b>17.38</b>
<b>Total (domestic and international)</b>		
North West	£1,656	22.4
<b>England</b>	<b>£18,383</b>	<b>192.7</b>

<sup>4</sup> TBR (2016) Heritage Economic Indicator Workbook

<sup>5</sup> 'Spend' is the expenditure relating to these trips. It includes costs paid in advance of the trip, costs paid during the trip itself and also any bills relating to the trip received after returning home.

<sup>6</sup> Note: This is a gross figure and not the value added of heritage tourism. The value added estimates would exclude intermediate consumption of goods and services.

Compared to the national average, as shown in the following graph, heritage-related domestic visit spending provides a proportionally higher source of tourism income in the North West than nationally. Consequently, heritage-related international visitor spend accounts for a significantly lower proportion of tourism income in the North West.



### Heritage Construction

*Heritage-related construction plays an important part of the North West's construction industry.*

The historic environment forms a vital part of our nation's infrastructure, providing premises for businesses; homes for residents; and amenities and utilities for communities and visitors.

Repair and maintenance of historic buildings in the North West directly generated **over £1.2b in heritage-related construction sector output** in 2015<sup>7</sup>. This is equivalent to 8% of total construction output or 25% of the repair and maintenance output.

North West Construction Output (£m)	2011	2012	2013	2014	2015
Heritage-related construction	£1,092	£1,106	£1,209	£1,319	£1,207
All construction	£11,793	£11,015	£12,423	£13,770	£14,765
Heritage as % of total construction	9.3%	10.0%	9.7%	9.6%	8.2%

This document has been prepared as part of Heritage Counts 2016 by Historic England on behalf of the Historic Environment Forum.



<sup>7</sup> Note: This is a gross figure and not the value added of heritage tourism. The value added estimates would exclude intermediate consumption of goods and services.

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