

HERITAGE COUNTS

SOUTH WEST - HERITAGE ECONOMY 2016

HEADLINE FACTS

- Heritage directly contributed over **£1.2 billion in Gross Value Added (GVA)** in the South West in 2013
- In 2013, there were **over 22,000 people directly employed in heritage** in the South West
- In 2014, heritage tourism **generated over £1.8 billion in spending by domestic and international visitors** in the South West
- Repair and maintenance of historic buildings in the South West directly generated **£974 million 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 TBR¹ 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 Estimates². The workbook can be found on the Heritage Counts website (www.heritagecounts.org.uk).

Heritage contributes to the generation of economic output

Heritage directly contributed over **£1.2 billion in Gross Value Added (GVA)** in the South West in 2013³, comparable to agriculture, forestry and fishing at £1.3 billion. This figure increases to nearly **£2.7 billion** when direct, indirect and induced heritage GVA is combined. This is equivalent to **2.3% of total GVA** in the South West.

Area	2011	2012	2013
TOTAL GVA (m) (Direct, Indirect and Induced)			
South West	£2,519.5	£2,654.5	£2,686.6
% of total GVA for the South West	2.3%	2.4%	2.3%
England	£ 21,363	£ 21,116	£ 21,697
% of total GVA for England	1.7%	1.7%	1.6%

¹ TBR (2016) Heritage Economic Indicator Workbook

² DCMS (2015) Creative industries Economic Estimates: Statistical Release

³ TBR (2016) Heritage Economic Indicator Workbook

Heritage is an important employer in the South West

In 2013, there were **over 22,000 people directly employed in heritage** in the South West. Including indirect and induced employment, this number increases to **over 44,100**. The number of people employed in heritage in the South West has declined since 2011 primarily due to a decline in heritage construction employment.

Area	2011	2012	2013
Total Heritage employment (Direct, Indirect and Induced)			
South West	45,900	45,100	44,100
England	334,500	325,500	324,700

THE ECONOMY: SECTORAL IMPACTS

The TBR⁴ 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 over £1.8 billion in spending⁵ by domestic and international visitors** in the South West⁶. In total, it is estimated that there were over 2.9m domestic overnight trips, over 17m domestic day trips and over 21m international visits to the South West in 2014.

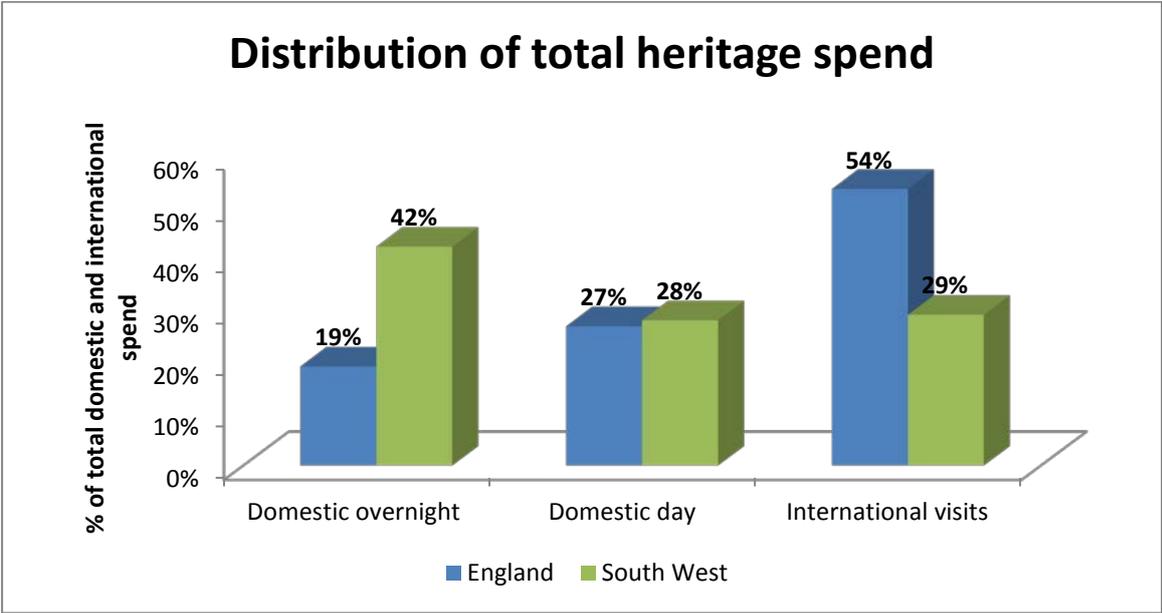
Heritage-related visitors (2014)	Heritage-related spend (£m)	Heritage-related trips/visits (m)
Domestic overnight		
South West	£778	2.93
England	£3,549	15.94
Domestic day		
South West	£517	17.3
England	£4,978	156.43
International		
South West	£537	1.13
England	£9,856	17.38
Total (domestic and international)		
South West	£1,832	21.4
England	£18,383	192.7

⁴ TBR (2016) Heritage Economic Indicator Workbook

⁵ '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.

⁶ 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 overnight visit spending provides a proportionally higher source of tourism income in the South West than nationally. Consequently, heritage-related international visitor spend account for a significantly lower proportion of tourism income in the South West.



Heritage Construction

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

The built 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 South West directly generated **£974 million in heritage-related construction sector output** in 2015⁷. This is equivalent to 9.3% of total construction output or 24% of the repair and maintenance output in the South West.

South West Construction Output (£m)	2011	2012	2013	2014	2015
Heritage-related construction	£1,395	£1,266	£1,381	£1,507	£1,572
All construction	£9,933	£9,380	£9,978	£10,571	£10,502
Heritage as % of total construction	8.5%	9.1%	9.0%	9.2%	9.3%

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



⁷ 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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