The economic contribution of England’s heritage sector

A Cebr report for Historic England

April 2026

,

Disclaimer

Authorship and acknowledgements

This report has been produced by Cebr, an independent economics and business research consultancy established in 1992. The views expressed herein are those of the authors only and are based upon independent research by them.

The report does not necessarily reflect the views of Historic England.

London, April 2026

Contents

Table of Figures **4**

1. Executive Summary **5**

2. Introduction **10**

3. Methodology **12**

3.1 Direct contributions of the heritage sector 12

3.2 Aggregate contributions of the heritage sector 16

4. Direct contributions of the heritage sector **19**

4.1 Gross value added 19

4.2 Employment 23

5. Aggregate contributions of the heritage sector **28**

5.1 Gross value added 28

5.2 Employment 31

6. Spillover impacts of the heritage sector through tourism **35**

6.1 Domestic overnight tourism 35

6.2 Domestic day visits 39

6.3 International tourism 41

7. Appendix **45**

Table of Figures

Figure 1: Direct impacts, 2011-2024 (GVA impacts in Chained Volume Measures at 2024 price levels) 6
Figure 2: Aggregate impacts, 2022-2024 (£ billion CVMs of GVA; '000s of jobs) 7
Figure 3: Direct heritage GVA and employment in English regions 2023 (£bn at 2023 prices and '000s of filled jobs) 8
Figure 4: Total regional heritage tourism spending, 2024, £ billions at 2024 prices 9
Figure 5: Core heritage SIC codes and their heritage share of jobs 14
Figure 6: Heritage SOC codes and their heritage job shares 15
Figure 7: Economic impact layers 17
Figure 8: Core heritage SIC codes and their heritage job share 19
Figure 9: Direct GVA of the heritage sector 2011-2024, £ millions in CVM at 2024 price levels 20
Figure 10: Fifteen SIC codes with largest heritage GVA contributions, 2023, £ millions at 2023 prices 21
Figure 11: Direct GVA of the heritage sector by English region 2023, £ billions at 2023 prices 22
Figure 12: Direct employment of the heritage sector 2011-2024, '000s of filled jobs 23
Figure 13: Fifteen SIC codes with most heritage jobs, 2023, '000s of filled jobs 24
Figure 14: Direct employment in the heritage sector in English regions 2023, '000s of jobs 25
Figure 15: Cumulative inflation-adjusted growth in heritage GVA and jobs 2011-2024 (base 2011) 26
Figure 16: Direct GVA per job, 2011-2024, £ '000s in 2024 CVMs 27
Figure 17: Aggregate GVA supported by the heritage sector 2022-2024, £ billions in 2024 CVM 29
Figure 18: Aggregate GVA supported by the heritage sector by English region 2023, £ millions at 2023 prices 30
Figure 19: Aggregate employment supported by the heritage sector 2022-2024, '000s of jobs 31
Figure 20: Aggregate employment supported by the heritage sector by English region 2023, '000s of jobs 32
Figure 21: GVA per employee by impact layer, 2023, £ '000s at 2023 prices 33
Figure 22: Heritage sector supply chain spending with fifteen largest supplier industries, 2023 (% of total supply chain spending) 33
Figure 23: Domestic overnight trips, 2021–2024, millions 36
Figure 24: Domestic overnight trip expenditure, 2021–2024, £m at 2024 prices 37
Figure 25: Domestic overnight holiday trips, 2021-2024, millions 38
Figure 26: Domestic overnight holiday trip expenditure, 2021–2024, £m at 2024 prices 39
Figure 27: Domestic day visits, 2021–2024, millions 40
Figure 28: Domestic day visit expenditure, 2021–2024, £m at 2024 prices 41
Figure 29: Inbound international heritage visitors, 2012–2024, '000s 42
Figure 30: Inbound international visitor expenditure, 2012–2024, £bn at 2024 prices 43
Figure 31: Total regional heritage tourism spending, 2024, £bn at 2024 prices 44
Figure 32: Direct heritage GVA by region and SIC division 2023 (£m at 2023 price levels). 45

1. Executive Summary

Report overview

- Historic England commissioned Cebr to assess the economic contributions made by the heritage sector in England. This report covers the years 2011–2024, building on research jointly undertaken with Historic England and DCMS.
- That research developed a refined SIC-SOC methodology, aligned with DCMS's sector estimates methodology, and measured the UK's heritage sector contribution from 2011–2022. This report extends that research by producing estimates for 2023 using the same methodology, and provisional forecasts for 2024, for England's heritage sector.
- This report considers the direct economic contributions made as well as the wider economic footprint supported indirectly through the industry's supply chains and induced by the wider spending of employees. The report also considers the spillover contributions of the heritage sector through tourism.

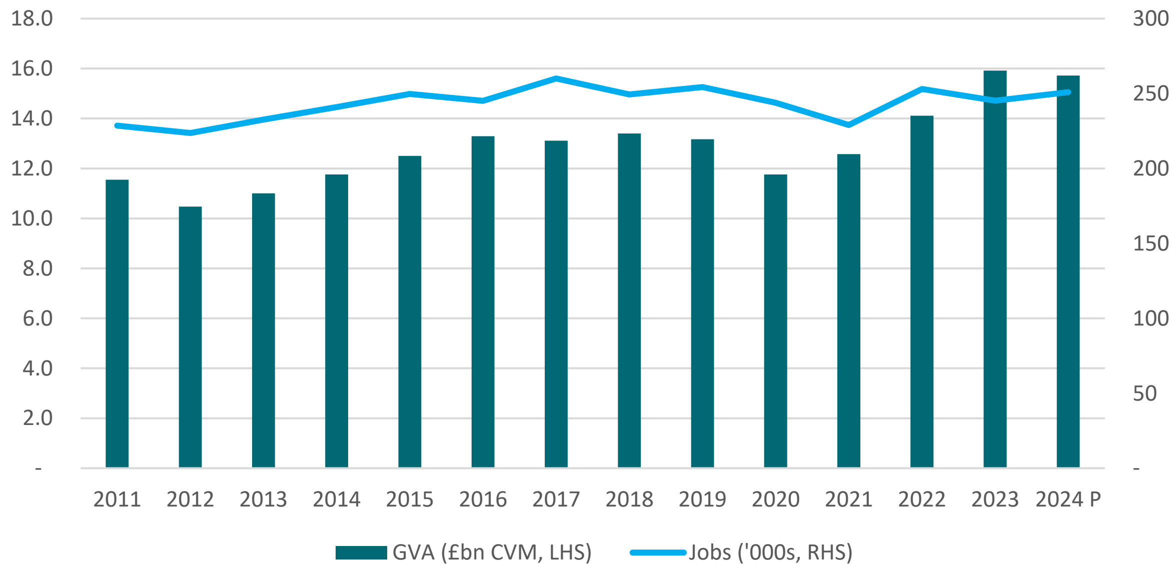
Methodology

- Our results are presented in terms of two key economic indicators: gross value added (GVA) and employment (as measured by number of filled jobs).
- Heritage employment is calculated using a SIC-SOC mapping methodology: industries and occupations relevant to the heritage sector are identified; and estimates are made of the heritage proportion of these industries' employment. Both first and second jobs are included within our employment analysis, with data drawn from the Annual Population Survey.
- Heritage sector GVA is calculated by assuming that the heritage-generated GVA of an industry is proportionate to the share of heritage employment in that industry. GVA estimates are drawn from the UK National Accounts, with supplementary data from the Annual Business Survey.
- We then conform the calculated direct impacts to the ONS's national accounts framework to establish the typical supply-chain relationships of the heritage sector. This is used to estimate the indirect and induced impact layers.
- Since official data for 2024 have only partially been released, our estimates for 2024 are provisional projections based on observed labour market data and estimated productivity growth (indicated with P in graphs).

Direct economic contributions

- In 2023, England's heritage sector directly contributed £15.9 billion in gross value added (at 2024 price levels), and provided 245,000 jobs.
- Between 2011 and 2024, the heritage sector directly contributed:

Figure 1: Direct impacts, 2011-2024 (GVA impacts in Chained Volume Measures at 2024 price levels)



Sources: ONS, Cebr analysis

- In real terms, the gross value added by the heritage sector increased 38% from £11.5 billion in 2011 to £15.9 billion in 2023. This represents a compound annual growth rate of 2.4%. However, our projections for 2024 indicate that the sector's GVA declined £198 million to £15.7 billion.
- Heritage employment has grown more slowly, rising from 229,000 jobs in 2011 to 245,000 in 2023 (7%). Our projections indicate a further 2% increase in heritage jobs between 2023 and 2024, to 251,000.
- The sectors in which the greatest heritage activity occurs are specialised construction, museums and archive activities, and real estate activities.

Input-output analysis

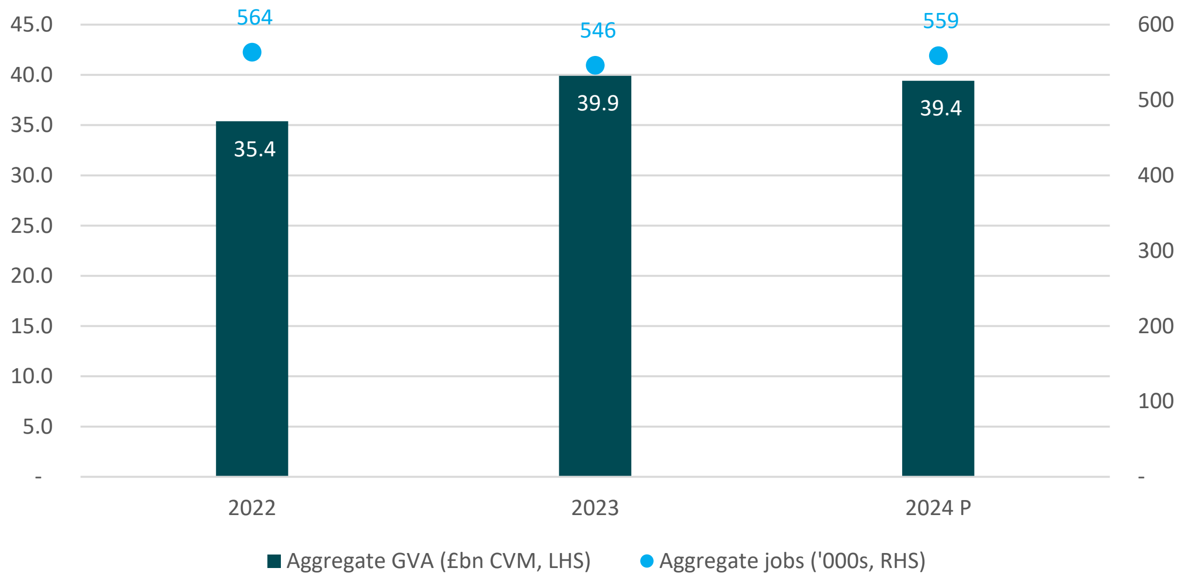
- Beyond the direct impacts outlined above, the heritage sector supports a broader economic footprint. This wider contribution is captured through two additional channels: indirect impacts, representing activity supported within supply chains; and induced impacts, reflecting wider economic activity driven by the spending of employees engaged in both direct and indirect roles.
- Our results show the following:
  - For every £100 of GVA directly generated by the heritage sector, an additional £151 of GVA is supported in the wider UK economy.
  - For every 100 jobs directly generated by the heritage sector, a further 123 jobs are supported elsewhere in the economy.

Aggregate footprint

- Summing the direct, indirect and induced impacts of the sector, in 2023 the heritage sector supported an aggregate footprint of £39.9 billion of GVA and 546,000 jobs.

- Between 2022 and 2024, the aggregate contributions of the heritage sector totalled:

Figure 2: Aggregate impacts, 2022-2024 (£ billion CVMs of GVA; '000s of jobs)



Sources: ONS, Cebr analysis

- The aggregate GVA contributions of the heritage sector were largest in 2023, reaching £39.9 billion at 2024 price levels, a 13% increase on 2022. We project that in 2024, aggregate GVA supported will decline 2% to £39.4 billion.
- Aggregate employment supported was greatest in 2022, however, with 564,000 jobs supported throughout the UK. Aggregate jobs fell 3% to 546,000 in 2023, though projections indicate that a 2% recovery occurred in 2024, to 559,000 jobs supported.

Regional contributions

- In 2023, direct heritage employment was greatest in London (50,000), the South East (45,000) and the South West (31,000).
- In the same year, direct heritage GVA was largest in London (£3.3 billion), the South East (£2.8 billion) and the North West (£1.7 billion).

Figure 3: Direct heritage GVA and employment in English regions 2023 (£bn at 2023 prices and ‘000s of filled jobs)

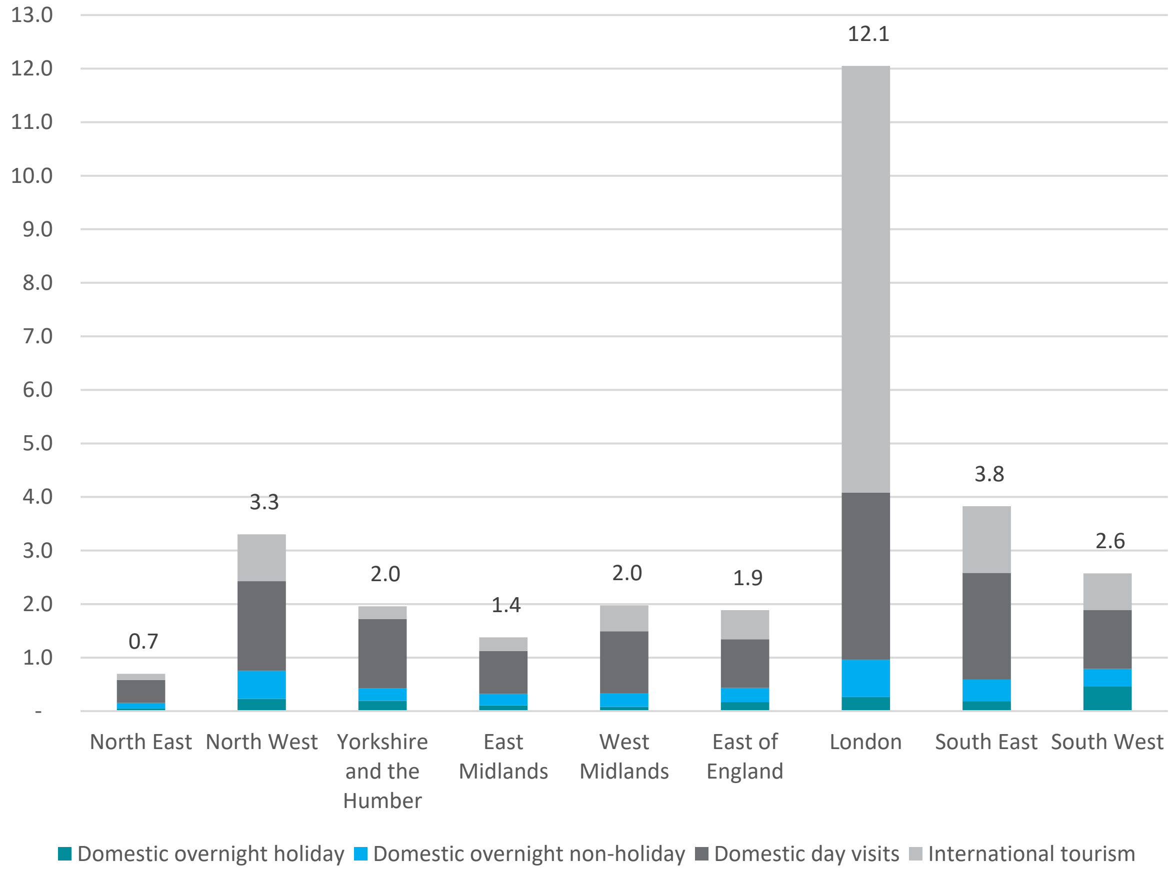
Sources: ONS, Cebr analysis

- Considering aggregate impacts, London also supported the highest level of GVA in 2023, at £8.0 billion.
- Aggregate employment supported was greatest in the South East and London, at approximately 104,000 jobs each.

Tourism spillovers

- London continues to see the most heritage tourist expenditure of all of England’s regions, receiving £12.1 billion in 2024, of which two thirds (£8.0 billion) was spent by international visitors
- The next most popular region for heritage tourism expenditure is the South East, receiving less than one third of London’s total, at £3.8 billion.

Figure 4: Total regional heritage tourism spending, 2024, £ billions at 2024 prices



Sources: ONS, Visit Britain, Cebr analysis

2. Introduction

The Centre for Economics and Business Research (Cebr) is pleased to present this report, commissioned by Historic England, on the economic contribution of England's heritage sector.

Past research has consistently found that measuring the economic contribution of the heritage sector is inherently difficult. This is primarily because the sector spans a wide range of traditional activities, which are not easily captured by official statistics.

Standard Industrial Classification (SIC) codes provide the official system for classifying economic activity by industry and form the basis of much of the UK's economic data and national accounts. However, since the heritage sector spans many traditional industries classified by SIC codes, previous methodologies used to track the value of the sector have struggled to accurately capture the sector's breadth. In particular, the Department for Culture, Media and Sport (DCMS), which is the government body responsible for administering the heritage sector, historically approximated the economic value of the heritage sector by tracking only one heritage-related SIC code: 91.03, 'Operation of historical sites and building and similar visitor attractions.' This approach was recognised as significantly understating the true value of the sector.

To address these issues, research commissioned by Historic England and undertaken by Cebr employed a combined SIC-SOC approach, drawing on both industry and occupational data to provide a more accurate assessment of the sector's total economic footprint. Cebr has been conducting this approach on a nearly annual basis, since 2018. [1]

A subsequent feasibility study by Alma Economics, commissioned by DCMS with the goal of assessing the different theoretical approaches for assessing the economic contribution of the heritage sector, concluded that this was the most robust of the existing methods for producing heritage sector statistics. That work culminated in the development of a refined methodology, as set out in the research commissioned by Historic England and DCMS and conducted by Cebr. The resulting methodology aligns with the National Accounts standards and with DCMS Sector Economic Estimates methodology.

This report applies the refined methodology to estimate the economic contribution of the heritage sector in England. The original application of this approach covered the period 2011 to 2022. The present analysis extends the time series by producing estimates for 2023 for England using the same framework, and by forecasting the sector's contribution in 2024. It also extends the analysis to consider indirect and induced economic impacts, as discussed further in Section 5 of this report.

[1] Cebr's most recent report for Historic England, published in August 2024, can be found at:
https://historicengland.org.uk/content/heritage-counts/pub/2024/heritage-sector-england-impact-on-economy-2024/

The key data sources informing our analysis include the ONS's Annual Business Survey (ABS) and Annual Population Survey (APS). We also draw on the ONS's Supply and Use Tables and Balanced Regional GVA tables.

Part of this research was undertaken in the Office for National Statistics' Secure Research Service (SRS), using data from ONS and other owners, and does not imply the endorsement of the ONS or other data owners.

Structure of the report

The report is structured as follows:

- Section 3 sets out the methodology used for calculating the direct and aggregate economic impact of the heritage sector
- Section 4 presents the direct economic contribution of the heritage sector in England
- Section 5 presents the aggregate impact of the sector across the wider economy
- Section 0 presents the spillover impacts of the heritage sector through tourism
- Section 7 comprises the appendix.

3. Methodology

3.1 Direct contributions of the heritage sector

Our analysis considers two key indicators of the contributions made to the British economy by the heritage sector:

Gross value added (GVA)

GVA is a measure of the contribution to GDP made by an individual business or industry. It measures the value which businesses add to the goods and services they purchase, and is calculated as the difference between turnover and total intermediate consumption (the cost of goods and services used in production).

GVA is distributed across three main channels: to employees (as wages), to shareholders (as profits), and to the government (through taxes net of subsidies).

Employment

The number of filled jobs within the heritage sector. This includes both first and second jobs.[2] Our analysis employs the methodology recently developed with Historic England and DCMS. The methodology consists of the following steps:

1. Collect data on heritage sector employment across the industries and occupations in which heritage-related activity is conducted;
2. Map employment in heritage occupations with employment across all (heritage and non-heritage) industries;
3. Use heritage employment counts by industry to estimate the proportion of activity in each industry attributable to the heritage sector;
4. Multiply these proportions by National Accounts estimates of gross value added by industry.

Identification and counting of heritage jobs

Heritage-related activity may be conducted by employees working in industries dedicated fully to preserving and showcasing England's heritage (such as museums), or by employees

[2] The Annual Population Survey derives its employment and socio-demographic estimates from the Labour Force Survey, which collects information on both main and second jobs for each respondent. This is important because many workers hold more than one job, particularly in certain heritage subsectors. A full assessment of employment in the sector therefore needs to account for workers whose second job is heritage-related, as these roles would not be captured if only main-job data were used. Further information on the definitions and treatment of main and second jobs can be found in the Labour Force Survey and Annual Population Survey user guides, at: https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/methodologies/labourforcesurveyuserguidance

conducting work in non-heritage industries but whose work directly contributes to supporting heritage (such as archivists in universities).

To capture the breadth of activity related to the heritage sector, the joint work with DCMS and Historic England identified the industries and occupations contributing to the heritage sector. The research also estimated the proportion of employment which is typically heritage-related in these occupations and industries.

The number of filled jobs in these industries and occupations are drawn from the ONS's Annual Population Survey (APS), defined by their Standard Industrial Classification (SIC) codes and Standard Occupational Classification (SOC) codes. For individuals working multiple jobs, both first jobs and secondary jobs were included within the analysis. In this research, the ONS's Secure Research Service was used to access APS data.[3]

To associate heritage employment with gross value added, presented by SIC code in the National Accounts, jobs in heritage occupations were mapped to the industries in which these workers were employed. This process is referred to as SIC-SOC mapping. It takes account of the proportions of jobs in each industry (SIC code) and occupation (SOC code), determined to be heritage-related, through the set of heritage SICs and SOCs agreed per the research with DCMS and Historic England. The result is a list only of SIC industries by their number and proportion of heritage jobs. These industries are referred to as 'core heritage industries.' When employment in heritage occupations is mapped to non-heritage related industries, these industries are referred to as 'secondary heritage industries.'

The SIC and SOC codes identified as heritage related, and the proportions of jobs in these codes deemed to be heritage-related jobs, are presented in Figure 5 and

3 The DOI for this dataset is: https://doi.org/10.57906/0qp1-6k77.

Figure 6, respectively.

Figure 5: Core heritage SIC codes and their heritage share of jobs

SIC codes	Code description	Heritage jobs, %
43.3	Building completion and finishing	24.8%
43.9	Other specialised construction activities	24.8%
91.012	Archive activities	100%
91.020	Museum activities	100%
91.030	Operation of historical sites, buildings and visitor attractions	100%

Figure 6: Heritage SOC codes and their heritage job shares

SOC codes	Code description	Heritage jobs, %
2115	Social and humanities scientists [4]	21.7%
2151	Conservation professionals	100.0%
2451	Architects	20.5%
2453	Quantity surveyors	20.5%
2454	Chartered surveyors	20.5%
2472	Archivist and curators	100.0%
3114	Building and civil engineering technicians	20.5%
5113	Gardeners and landscape gardeners	1.9%

Estimation of gross value added

National Accounts GVA estimates by industry are drawn from the Supply-Use Tables (at the UK level) and the Balanced Regional GVA tables (for the UK's constituent nations and regions). Using balanced GVA makes comparison with the wider UK economy more straightforward and ensures that non-market production is included in the DCMS estimates.

These estimates are presented at the 2-digit SIC code level, whereas the heritage employment shares from the APS are detailed at the 4/5-digit SIC code level. Therefore, to apportion the National Accounts GVA estimates, a further step is required to identify the share of GVA at the 2-digit level contributed by each subsidiary 4-digit SIC code. This percentage is calculated as 4-digit approximate GVA (aGVA) as a share of 2-digit aGVA in the Annual Business Survey (ABS).

The full estimation of GVA by industry is therefore given by:

Share of heritage employment in 4/5-digit SIC code	multiplied by	Share of 4-digit aGVA in 2-digit SIC code	multiplied by	GVA of 2-digit SIC code in each region and nation.

For certain 4/5-digit SIC codes, aGVA may be negative in the ABS, due to factors such as high levels of public subsidy or poor survey coverage. In these cases, two alternative approaches are followed. Firstly, we estimate the turnover of the 4-digit SIC code as a share of its 2-digit SIC code's turnover, instead of using aGVA. In most cases, this is a reasonable approximation of activity within a given industry. Where turnover data are unavailable (if the

4 This SOC code includes all social and humanities scientists. However, for the purposes of this methodology we consider only archaeologists, which research has shown to comprise approximately 21.7% of jobs in the SOC code.

SIC code is not covered by the ABS or if it is suppressed for data security reasons), we instead use heritage employment in the 4/5-digit SIC code as a share of all employment in the 2-digit SIC code.

This methodology produces estimates in current prices (CP) which are then used to construct chained volume measures (CVM), which remove the effect of inflation by linking (chaining) to the price levels of a base year.

Limitations of this approach include that we are unable to capture heritage activity which is not well identified by the SIC and SOC systems; and that employment and GVA estimates are reliant on the ABS and APS achieving sufficient coverage and robust results.

3.2 Aggregate contributions of the heritage sector

Input–Output modelling

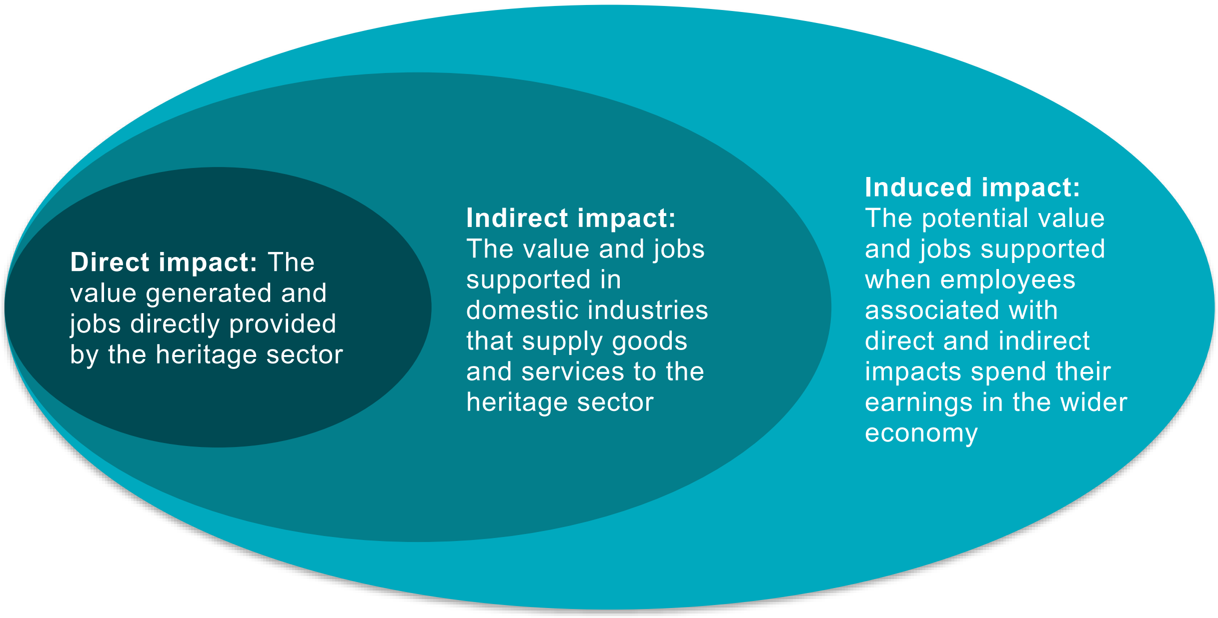
The direct activity of England's heritage sector is not the only channel through which the sector contributes to the UK economy. We additionally consider two further channels, also referred to as impact layers:

- **Indirect impacts** – Heritage industries, as well as heritage employees working within non-heritage industries, procure goods and services from a range of suppliers in order to deliver their activities. This generates additional GVA and employment effects upstream in the supply chain. Those suppliers, in turn, source inputs from their own suppliers, creating further rounds of economic activity. The indirect impact therefore reflects the total GVA and employment supported across the heritage sector's supply chains [5]
- **Induced impacts** Income earned by those employed directly in the heritage sector and indirectly through its supply chains is spent in the wider economy on everyday goods and services. This spending sustains further business activity, generating additional GVA and employment across other sectors. The induced impact measures the cumulative economic effects arising from household expenditure attributable to heritage activity-related earnings.

Summing these direct, indirect, and induced impact layers allows us to estimate the aggregate economic footprint of the heritage sector throughout the UK. These impact layers are summarised in Figure 7.

[5] Indirect and induced impacts are estimated using an economic model of the UK economy, which excludes imported inputs that do not support domestic activity. However, because the model covers the UK as a whole, it captures inputs supplied to firms in England by businesses in Northern Ireland, Scotland and Wales. For example, purchases by an English museum from a Welsh supplier are included in the indirect impacts.

Figure 7: Economic impact layers



Aggregate Impact = Direct + Indirect + Induced Impacts

To estimate the aggregate economic footprint of the heritage sector, we use input-output modelling. These models trace the flow of goods and services through supply chains and incorporate patterns of household spending to capture both indirect and induced effects. The models produces multipliers which reflect how much the sector's total economic contribution scales in relation to its direct impact. For example, a GVA multiplier of 2.1 suggests that every £1 of direct GVA generated by the heritage sector supports an additional £1.10 of GVA elsewhere in the economy.

Input-output modelling was not used in the joint research with Historic England and DCMS, but it was included in Cebr's earlier studies of England's heritage sector. Those previous studies linked SIC-SOC-mapped heritage employment to GVA using a different methodology, resulting in different industry-level estimates. Applying the industry-specific multipliers from the original SIC-SOC approach to the GVA estimates in this report would therefore be inappropriate.

For this research, we calculate updated multipliers using the ONS 2022 Supply-Use Table and our input-output models. With 2022 as the base year, these multipliers are applied only to direct impacts from 2022 to 2024, as structural changes in the UK economy before 2022, such as those resulting from Brexit and the Covid-19 pandemic, mean the multipliers likely will not accurately reflect inter-industry activity in earlier years. Multipliers have been produced for both GVA and jobs.

In addition to deriving national multipliers, we also calculate region-specific multipliers for each English region. These regional multipliers estimate the extent to which indirect and induced economic impacts generated by the heritage sector are retained within the same geographic region. For example, they enable statements such as: 'For every job directly created by the heritage sector in the North East, an estimated additional X jobs are supported within the North East economy.'

While based on the national multipliers, the regional variants are adjusted to reflect structural differences in regional economies. A typical example is that London's disproportionately high concentration of service-based industries means that the national multiplier for a given variable may not accurately capture the dynamics of the wider economic activity supported within supply chains and by employee spending in the London area. Accordingly, regional multipliers are refined to enhance national estimates by accounting for the unique composition of economic activity across different regions.

Projections to 2024

While we are able to apply in full the methodology described above for 2023, we are unable to do so for 2024. This is because the Annual Population Survey, from which the employment estimates by heritage industry and occupation are drawn, and upon which GVA calculations are based, is unavailable to researchers through the SRS at the time of analysis.

Estimates for 2024 are therefore projected as follows. First, growth rates in employment between 2023 and 2024 by industry are drawn from the Business Register and Employment Survey, and applied to heritage job counts by industry to estimate heritage employment in 2024. This makes the implicit assumption that the distribution of heritage employment between heritage occupations, heritage industries, and all other industries, has not changed significantly between 2023 and 2024.

Second, ONS productivity growth estimates between 2023 and 2024 are combined with employment growth estimates and applied to heritage GVA by industry, to estimate GVA for 2024. As a result, these estimates are provisional projections only and do not account for changes in the distribution of heritage employment among different SIC and SOC codes. Under the full methodology, accounting for these changes could raise or lower the proportion of each industry's GVA attributed to the heritage sector.

4. Direct contributions of the heritage sector

In this section we present the contributions made directly by the heritage sector to England's economy. We present contributions with respect to the sector's gross value added and employment, as measured by number of filled jobs.

As discussed in more detail in Section 3, the SIC codes determined to be core to the heritage sector, and the proportion of their employment included, are:

Figure 8: Core heritage SIC codes and their heritage job share

SIC codes	Code description	Heritage jobs, %
43.3	Building completion and finishing	24.8%
43.9	Other specialised construction activities	24.8%
91.012	Archive activities [6]	100%
91.020	Museum activities [6]	100%
91.030	Operation of historical sites, buildings and visitor attractions	100%

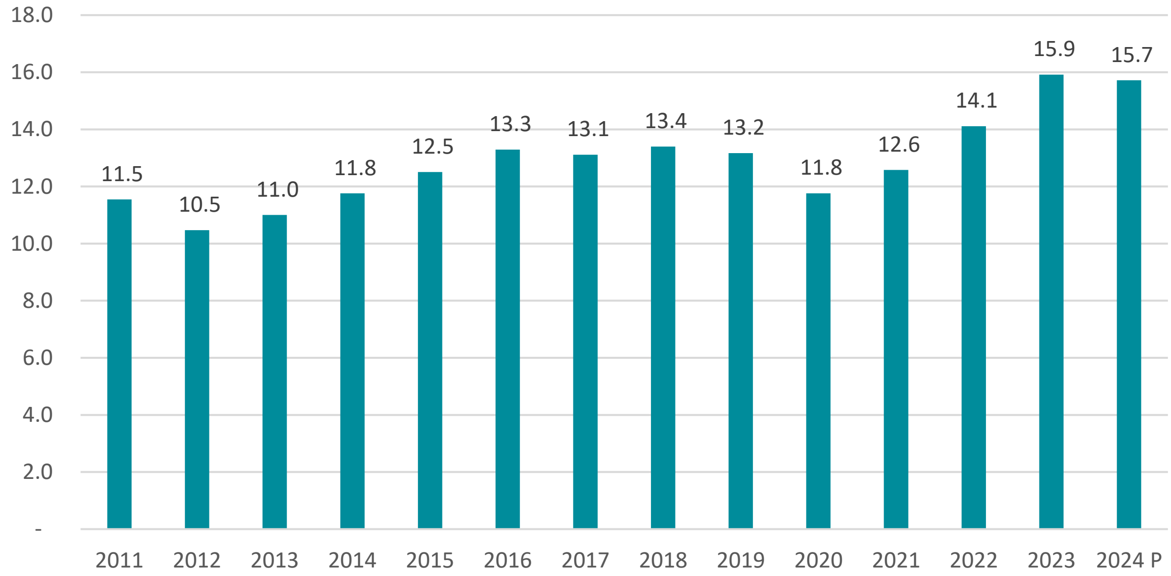
4.1 Gross value added

In 2023, England's heritage sector directly generated £15.9 billion in GVA, £1.8 billion (13%) higher after inflation than in 2022. We also project that the sector is likely to have contributed £15.7 billion in GVA in 2024.

Figure 9 presents the GVA directly by the heritage sector between 2011 and 2024 in Chained Volume Measures (CVM) at 2024 price levels. The estimate for 2024 (denoted with P) is a projection based on observed productivity growth and labour market trends by industry.

[6] SIC codes 91.012 & 91.020, Archive and Museum activities, are combined in this report because their individual observation counts in the APS were based on low sample sizes, and are therefore required by Statistical Disclosure Control rules to be suppressed individually or combined with other SIC code/s.

Figure 9: Direct GVA of the heritage sector 2011-2024, £ millions in CVM at 2024 price levels



Sources: ONS, Cebr analysis

The CVM series illustrates that England's heritage sector GVA contributions have grown reasonably steadily over the 14-year period, rising £4.2 billion (36%) after inflation from £11.5 billion in 2011 to an estimated £15.7 billion in 2024. The sector experienced a moderately strong recovery after the Covid-19 pandemic. In 2020, real GVA fell to £11.8 billion (2024 prices), a level last recorded in 2014, but by the end of 2021 had bounced back to £12.6 billion, and by 2022 had surpassed its pre-pandemic peak.

This relative resilience may reflect the sector's structural characteristics. Activities centred on the preservation and maintenance of tangible heritage assets, such as archives, libraries, historic buildings, and gardens, require ongoing expenditure, frequently supported by public funding. As a result, output was likely less exposed to international supply chain disruption than manufacturing, and less sensitive to short-term fluctuations in consumer demand than retail, hospitality, and leisure, industries which were particularly hard-hit during the pandemic.

Figure 10 details the fifteen SIC codes with the largest heritage GVA contributions in 2023, the latest year for which the full methodology could be applied. We present these results at 2023 price levels, meaning that the sum of impacts differs from that presented in Figure 10.

Figure 10: Fifteen SIC codes with largest heritage GVA contributions, 2023, £ millions at 2023 prices

SIC code	GVA, £m	% of total
43.999 Specialised construction activities n.e.c.	2,037	13.2%
43.320 Joinery installation	1,274	8.2%
43.390 Other building completion and finishing	1,205	7.8%
91.012 & 91.020 Archive and Museum activities [6]	1,176	7.6%
68.310 Real estate agencies	892	5.8%
43.910 Roofing activities	672	4.3%
43.341 Painting	599	3.9%
84.110 General public administration activities	464	3.0%
68.320 Management of real estate on a fee or contract basis	461	3.0%
81.300 Landscape service activities	433	2.8%
41.202 Construction of domestic buildings	440	2.8%
43.991 Scaffold erection	396	2.6%
43.330 Floor and wall covering	369	2.4%
43.310 Plastering	300	1.9%
71.122 Engineering related scientific and technical consulting activities	279	1.8%
All other SIC codes	4,482	29.0%
Total	**15,479**	**100.0%**

Sources: ONS, Cebr analysis

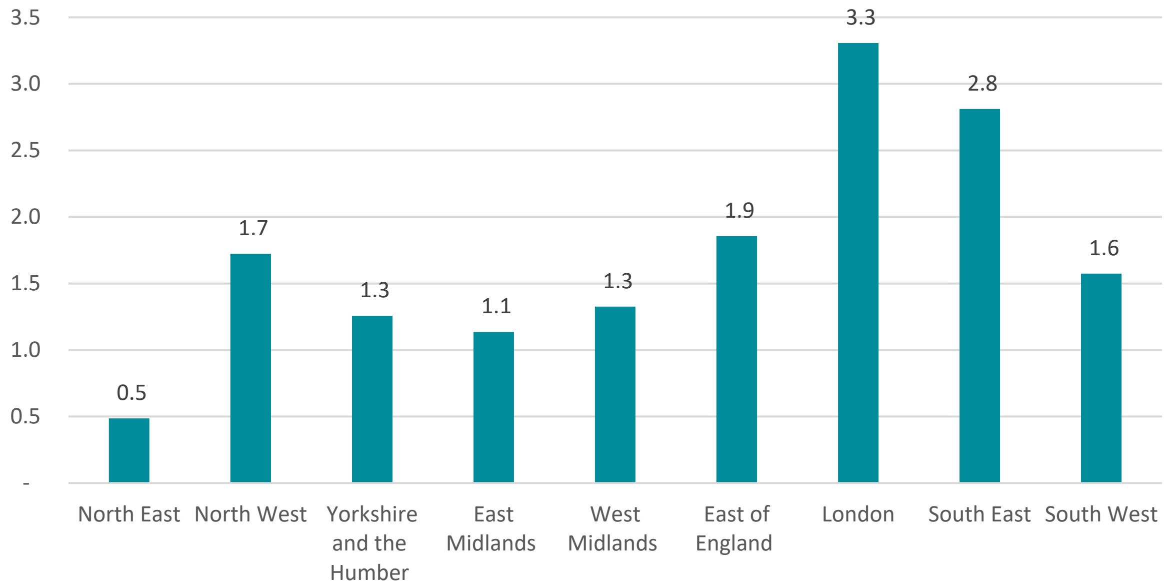
By far the SIC code providing the largest GVA in 2023 was 43.999, Specialised construction activities not elsewhere classified (n.e.c.), which contributed £2.0 billion (13.2% of England's £15.5 billion total at 2023 price levels). The second and third largest SIC codes (Joinery installation, and Other building completion and finishing) both generated more than £1.2 billion in GVA in 2023, and are also classified within the specialised construction industry.

This largely reflects a strong year for specialised construction (SIC division 43) in 2023, as activity in the sector picked up dramatically, possibly after many construction projects were cancelled or delayed due to the Covid-19 pandemic. This trend is also reflected in eight of the top fifteen SIC codes by GVA contribution falling within the specialised construction industry. All construction SIC codes combined (divisions 41-43) contributed £7.9bn in GVA in 2023 (51% of England's total). It is important to note that SIC groups 43.3 and 43.9 are among the SIC codes determined to be partially heritage-related in the methodology. They are therefore assigned a fixed heritage proportion derived from wider research during the Historic England and DCMS joint project.

Of the top fifteen SIC codes by GVA, only three are not directly related to the design, construction, maintenance or management of property: the combined codes of 91.012 Museum activities and 91.030 Archive activities, and 84.110 General public administration activities. Codes 91.012, 91.020 (not shown) and 91.030, are considered to be fully heritage-related, and so 100% of GVA in these industries is attributed to the heritage sector. General public administration (84.110) is not itself an inherently heritage-related activity. Its appearance in the top fifteen heritage industries in 2023 reflects the large number of workers employed in the SIC code in heritage-related professions.

Figure 11 presents the regional direct GVA contributions of the heritage sector in 2023.

Figure 11: Direct GVA of the heritage sector by English region 2023, £ billions at 2023 prices



Sources: ONS, Cebr analysis

London generated the most heritage sector GVA, at £3.3 billion, followed closely by the South East (£2.8 billion). The largest portion of London's heritage GVA is generated by the Archive and Museum activities industries (SIC codes 91.012 and 91.030). This reflects the fact that London has the highest concentration of museums of all of the UK's regions and nations. The combined industries generated £324 million in GVA in London, 77% higher than the £183 million recorded in the South East, the region with the second-largest contribution in these industries.

The South East sees larger absolute and relative contributions to heritage GVA from specialised construction (SIC codes in division 43), than does London. Specialised construction generates 47% of the South East's heritage sector GVA, and only 32% of London's heritage GVA.

Compared to London and the South East, lower GVA contributions generated in England's other regions are moderately lower. The East of England generated £1.9 billion in heritage-related GVA, driven with higher relative intensity by specialised construction activity than archives, museums, and other cultural industries, compared to England's other regions. Additionally, the East of England is notable for generating the highest level of heritage activity related to the support of agricultural services (SIC 01.610). This industry captures heritage-related activities like conservation work, dry stone walling and fencing, and land maintenance, demonstrating the importance of land-based heritage in the region.

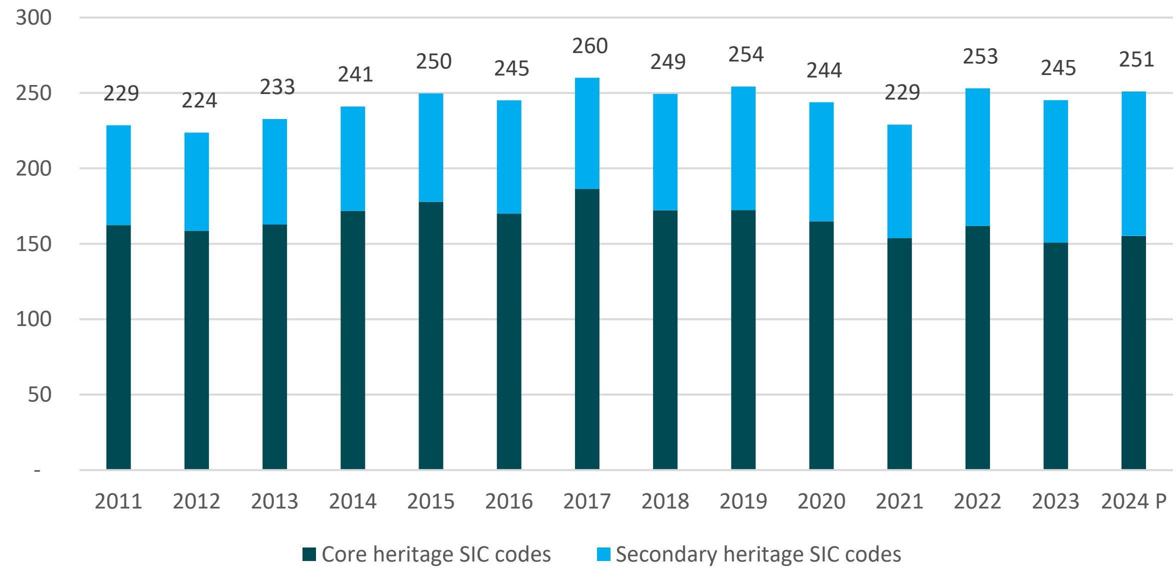
A more detailed breakdown of GVA impacts by industry group can be found in Section 7, the appendix.

4.2 Employment

In 2023, the heritage sector in England directly provided 245,000 jobs, a decline of 8,000 (3%) on 2022. We also project that the sector is likely to have provided 251,000 jobs in 2024.

Figure 12 presents the number of jobs provided directly by England's heritage sector from 2011 to 2024, split by 'core' and 'secondary' heritage SIC codes. Core heritage SIC codes are those which the Historic England-DCMS joint research determined to be in whole or in part inherently heritage-related, and employment in these SIC codes are assigned fixed heritage shares. Secondary heritage SIC codes are those industries which are not themselves inherently heritage-related but in which we observe employment in heritage occupations (classified using SOC codes). Section 3.1 provides more information on SIC-SOC mapping, and on the classification codes identifying heritage industries and occupations.

Figure 12: Direct employment of the heritage sector 2011-2024, '000s of filled jobs



Sources: ONS, Cebr analysis

The number of jobs directly provided by England's heritage sector increased by approximately 22,000 (10%) from 229,000 in 2011 to an estimated 251,000 in 2024. As with GVA, the trend in employment was notably stable around the pandemic, with only a moderate decline in employment in 2021, above the period low of 224,000 in 2012.

Figure 13 presents the fifteen largest SIC-codes by number of filled heritage jobs in 2023.

Figure 13: Fifteen SIC codes with most heritage jobs, 2023, '000s of filled jobs

SIC code	'000s of jobs	% of total
91.012 & 91.020 Archive and Museum activities [7]	47	19.1%
43.320 Joinery installation	29	11.9%
81.300 Landscape service activities	20	8.2%
43.999 Specialised construction activities n.e.c.	18	7.4%
43.341 Painting	16	6.5%
43.910 Roofing activities	10	4.2%
43.310 Plastering	7	2.7%
91.030 Operation of historical sites, buildings and similar visitor attractions	7	2.7%
94.990 Activities of other membership organisations nec	7	2.7%
43.390 Other building completion and finishing	6	2.6%
43.330 Floor and wall covering	6	2.4%
71.122 Engineering related scientific and technical consulting activities	6	2.3%
84.110 General public administration activities	5	2.2%
41.202 Construction of domestic buildings	4	1.8%
71.129 Other engineering activities	4	1.8%
All other SIC codes	53	21.7%
Total	**245**	**100%**

Sources: ONS, Cebr analysis

In contrast to GVA generation, the largest source of heritage employment is the combined Archive and Museums activities sector, which supports 47,000 jobs, representing 19.1% of England's 245,000 heritage jobs. Although it ranks fourth in GVA contribution, it accounts for the highest employment for two principal reasons.

First, the sector has a disproportionately high share of part time roles and secondary jobs. In headcount terms, this increases total employment relative to sectors such as specialised construction, although average hours worked are lower. Data from the Business Register and Employment Survey show that workers in specialised construction (SIC division 43) work on average 98% of full-time equivalent weekly hours, compared with 83% in libraries, archives, museums and other cultural activities (division 91).

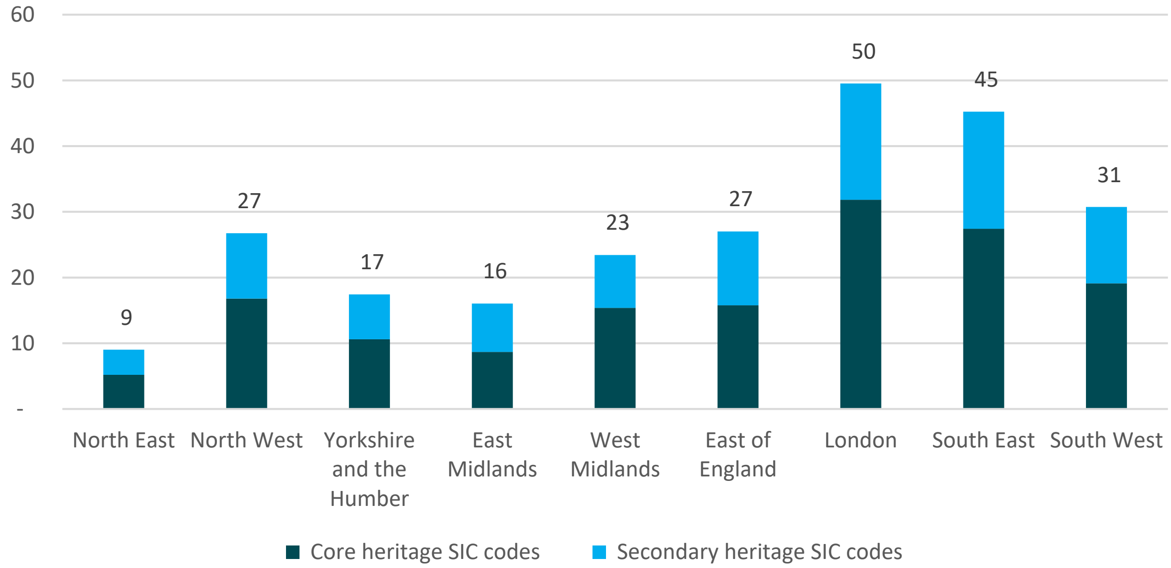
Second, specialised construction is a relatively higher productivity industry, with each worker generating significant value added in excess of intermediate input costs, reflecting the

[7] SIC codes 91.012 & 91.020, Archive and Museum activities, are combined in this report because their individual observation counts in the APS were based on low sample sizes, and are therefore required by Statistical Disclosure Control rules to be suppressed individually or combined with other SIC code/s.

technical and highly skilled nature of the work required on historic properties, such as skilled stonemasonry or work with specialist access requirements (climbing skills and technical equipment, etc.). By contrast, archive and museum activities, although also specialised, operate with lower levels of productivity.

Figure 14 presents the regional direct employment contributions of the heritage sector in 2023.

Figure 14: Direct employment in the heritage sector in English regions 2023, ‘000s of jobs



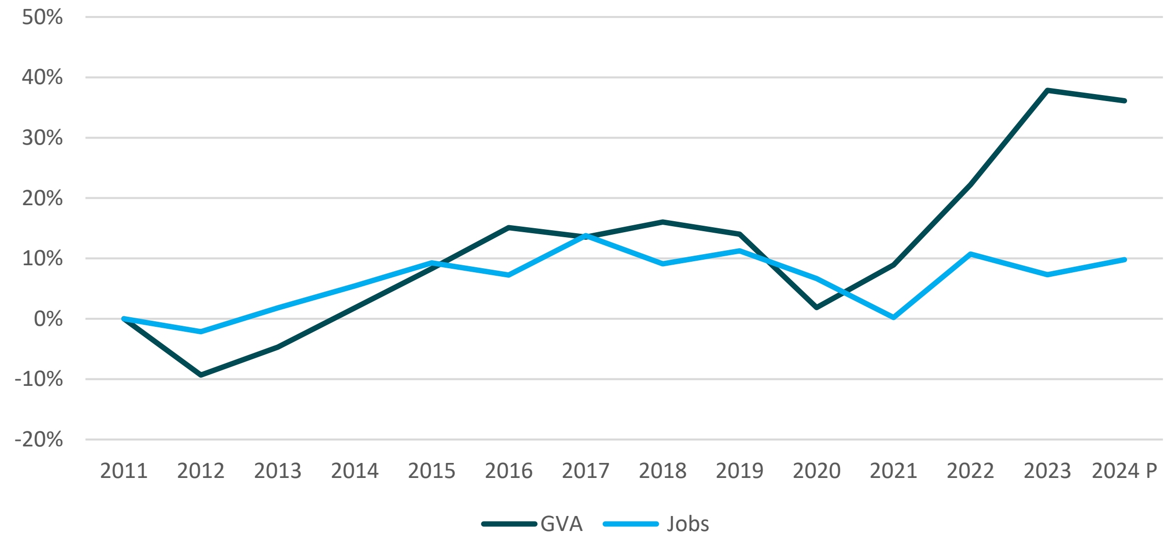
Sources: ONS, Cebr analysis

The regional pattern of heritage sector employment largely mirrors that of GVA. London’s heritage economy provides 50,000 jobs, comprising approximately 32,000 in core heritage industries and 18,000 in secondary heritage industries. The South East (45,000) and East of England (27,000) are again the second- and third-largest region by heritage activity when measured by total jobs, with the North West following closely at approximately 27,000 also.

The composition of employment varies by region. The West Midlands records the highest share of core heritage roles (66% of its total), while the East Midlands sees the lowest (54%). On average across England, 62% of heritage employment in 2023 was attributable to core heritage industries, with the remaining 38% arising from heritage related occupations within secondary industries.

Figure 15 presents the cumulative growth in jobs and GVA generated by England’s heritage sector in each year since 2011. Growth in GVA is presented in real terms, with the effect of inflation removed, so that the series reflects changes in the underlying volume of economic activity rather than growth in price levels.

Figure 15: Cumulative inflation-adjusted growth in heritage GVA and jobs 2011-2024 (base 2011)

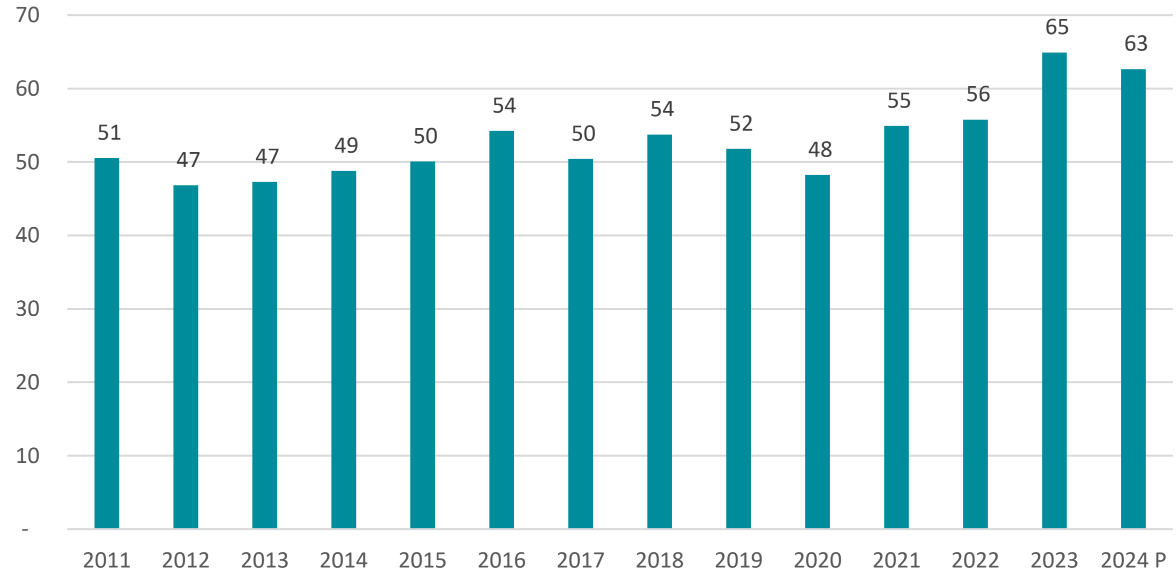


Sources: ONS, Cebr analysis

Figure 15 shows that over the 14-year period covered, real-terms growth in gross value added has generally outpaced growth in the number of jobs. England's heritage sector GVA increased 36% between 2011 and 2024 after inflation, while the number of jobs grew 10%. This indicates a significant rise in the level of productivity per worker, which is approximated here as gross value added per filled job.

However, this was not a secular increase. Between 2011 and 2015, productivity declined, as jobs growth outpaced GVA. From 2015 to 2019, productivity growth varied, with GVA per worker remaining broadly stable. However, after 2020, productivity growth in the sector surged. As presented in Figure 12, after a moderate decline in the number of heritage jobs in 2020, employment in the sector remained reasonably stable from 2022-2024, at just over 250,000 jobs. GVA, meanwhile, expanded 34% since 2020. This divergence between stable employment and expanding output implies a material improvement in measured productive efficiency.

Figure 16: Direct GVA per job, 2011-2024, £ '000s in 2024 CVMs



Sources: ONS, Cebr analysis

Figure 16 above, illustrates that gross value added per heritage job has increased 24% between 2011 and 2024, from £51,000 to £63,000. Productivity during the pandemic suffered only minorly in real terms, remaining broadly in line with pre-pandemic levels.

5. Aggregate contributions of the heritage sector

The economic impact of the heritage sector extends beyond its direct contributions. This section presents the results of our input-output modelling, which captures two additional channels of impact. First, it considers the activity supported across other businesses in the UK when business conducting heritage work purchase goods and services from suppliers, who in turn purchase inputs from their own suppliers. These effects are referred to as indirect contributions. Second, it considers the activity supported in businesses when employees in the heritage sector and its supply chains spend the earnings generated by heritage-related activity. These effects are referred to as induced contributions.

Taken together, the aggregate economic footprint of the heritage sector comprises its direct, indirect and induced contributions to the economy. In this section, we present aggregate impacts with respect to the same key variables as for direct impacts: GVA and employment. Section 3.2 explains input-output modelling in more detail.

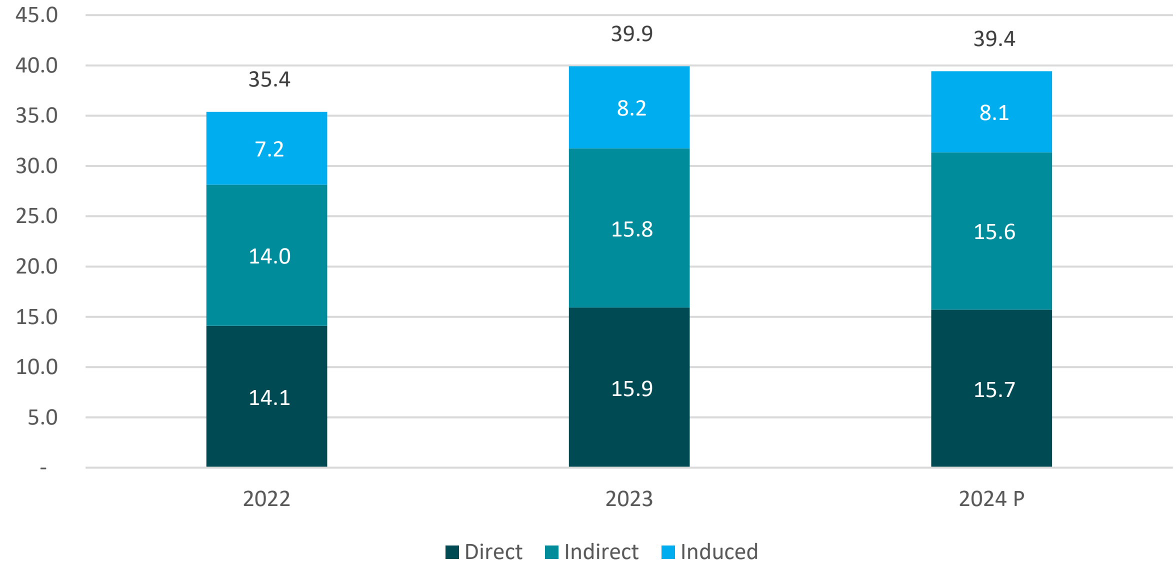
5.1 Gross value added

Updated multipliers were estimated to align with the refined heritage sector methodology, using the most recent Office for National Statistics Supply and Use Tables available at the time of modelling, specifically the 2022 tables. We estimate that:

- → For every £1 in GVA directly generated by England's core and secondary heritage industries, a further £0.99 is supported throughout the sector's supply chains in England and the rest of the UK, and a further £0.51 is supported through employee spending.
- → These correspond to an aggregate GVA multiplier of 2.51.

Figure 17 presents the aggregate GVA supported by England's heritage sector throughout the UK economy, between 2022 and 2024.

Figure 17: Aggregate GVA supported by the heritage sector 2022-2024, £ billions in 2024 CVM



Sources: ONS, Cebr analysis

Chained Volume Measures indicate that between 2022 and 2024, aggregate GVA supported peaked in 2023 at £39.9 billion. Using ONS productivity growth statistics and observed trends in employment growth in heritage industries, we estimate that 2024 will have seen a very slight decline in the GVA supported by the sector to £39.4 billion.

Approximately 40% of the aggregate GVA impact reflects direct contributions generated by core and secondary heritage industries. A further 40% arises from indirect activity supported through the sector's supply chain. The remaining 20% represents induced effects, generated when employees supported directly and indirectly by heritage activity spend their earnings in the wider economy.

Figure 18 presents the regional distribution of aggregate GVA in England in 2023.

Figure 18: Aggregate GVA supported by the heritage sector by English region 2023, £ millions at 2023 prices

Sources: ONS, Cebr analysis

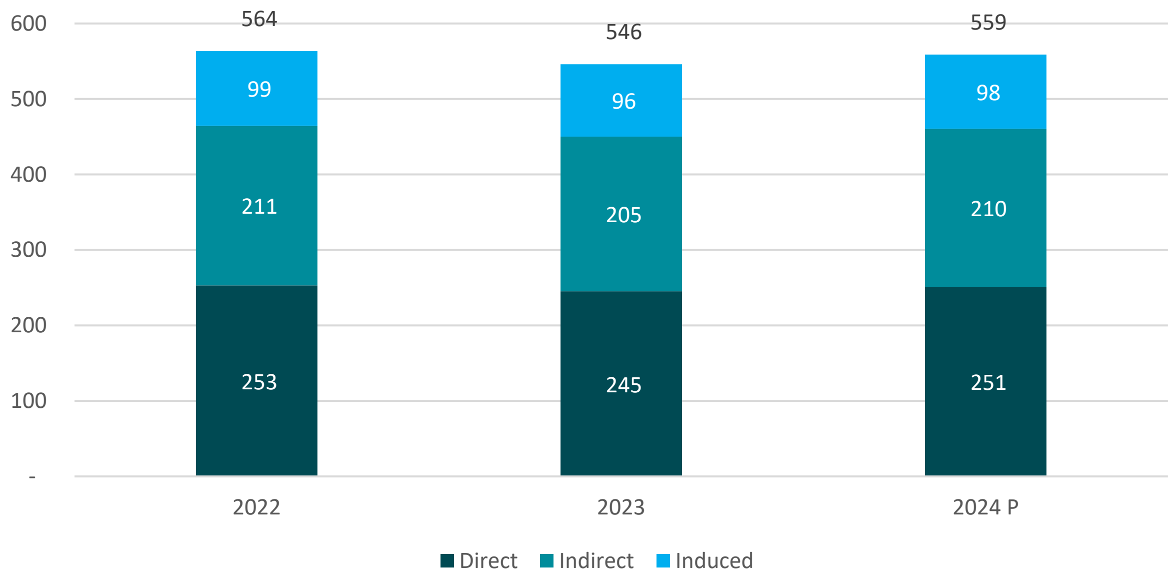
Although London generates the highest absolute level of GVA (£8.0 billion), it records one of the lowest aggregate GVA multipliers, at 2.43. This is primarily attributable to its indirect multiplier, which at £0.73 per £1 of direct GVA is the lowest of all English regions. As a result, given its direct GVA contribution of £3.3 billion, London supports £2.4 billion in GVA throughout its heritage supply chain. This compares to the £2.5 billion in indirect GVA supported by the South East's £2.8 billion in direct GVA. This pattern likely reflects the structure of London's heritage sector, particularly the prominence of museum and archive activities, whose supply chains may be more geographically dispersed. As a result, a greater share of procurement occurs outside the region, reducing the within-region indirect effect.

The South East records the highest aggregate GVA multiplier, at 2.67 (supporting £7.5 billion in regional GVA), while the West Midlands has the lowest, at 2.31 (supporting £3.1 billion in regional GVA). The West Midlands is notable for its comparatively low induced multiplier, at 0.45 relative to a national average of 0.51. Given that its indirect multiplier is closer to the average across England's other regions, this suggests that expenditure by employees supported directly and indirectly by heritage activity generates relatively limited additional economic activity within the region.

5.2 Employment

Figure 19 presents the number of jobs supported on aggregate by the heritage sector.

Figure 19: Aggregate employment supported by the heritage sector 2022-2024, '000s of jobs



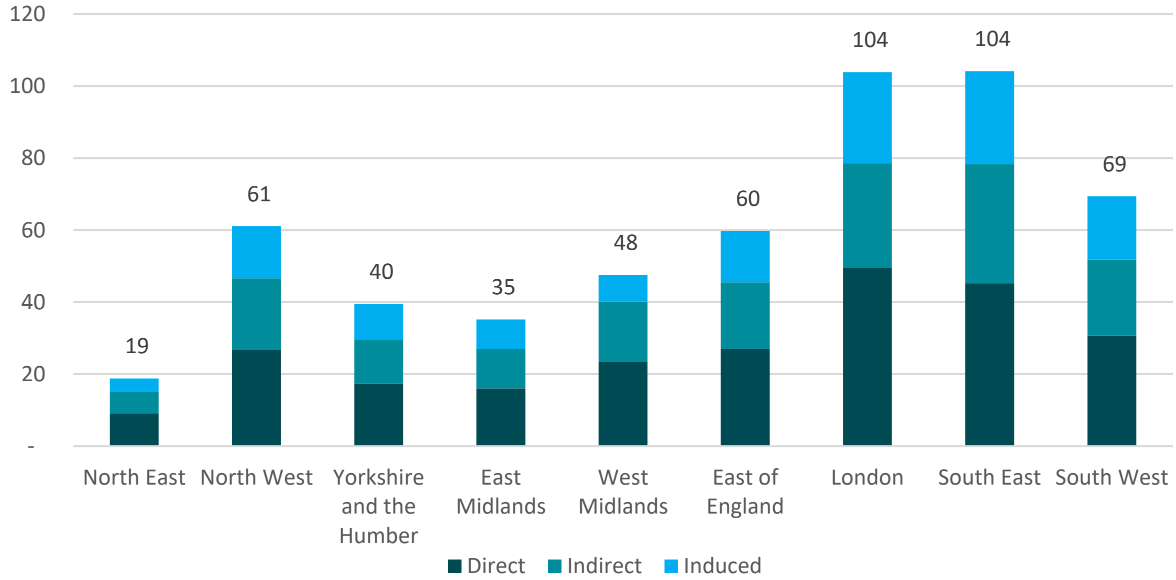
Sources: ONS, Cebr analysis

Aggregate employment supported by England's heritage sector reflects the relatively stable trend in direct employment between 2022 and 2024. The number of aggregate jobs supported fell 18,000 (3%) between 2022 and 2023, from 564,000 to 546,000. Our projections indicate a partial recovery from this slight decline to 559,000 aggregate jobs supported in 2024.

Around 45% of the total employment impact is attributable to direct activity within core and secondary heritage industries. Indirect job roles, arising from supply chain activity supported by the sector, account for a further 38%. The remaining 18% (rounded) is generated through induced effects, reflecting additional employment supported by the expenditure of earnings by workers linked directly and indirectly to heritage activity.

Figure 20 presents the regional distribution of aggregate employment supported throughout England in 2023.

Figure 20: Aggregate employment supported by the heritage sector by English region 2023, '000s of jobs



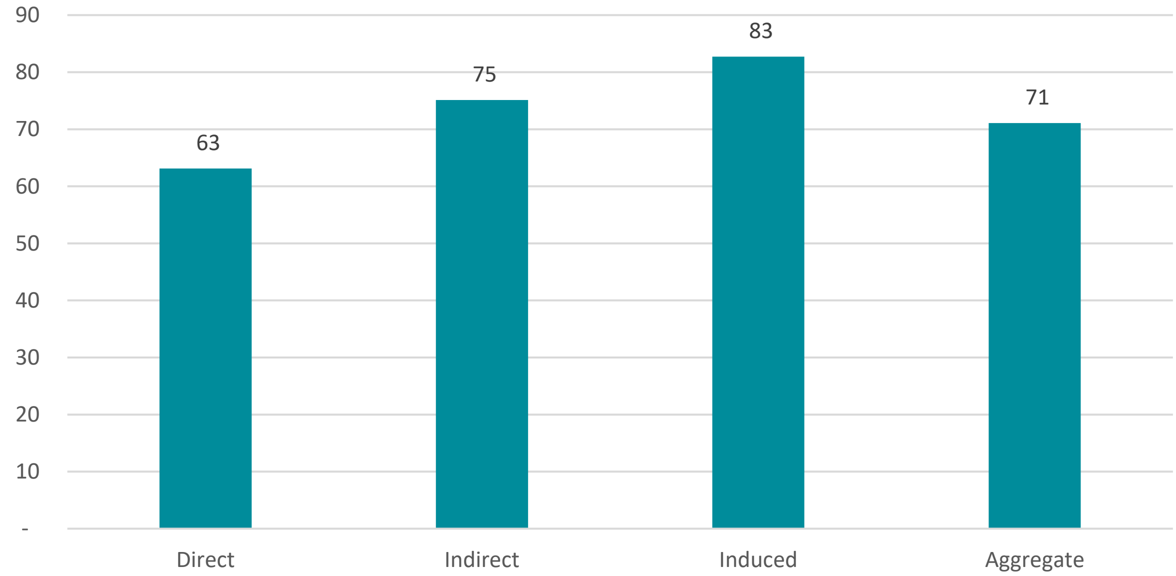
Sources: ONS, SRS, Cebr analysis

In contrast to the GVA distribution, the South East supported the largest number of jobs in 2023, despite having moderately lower direct employment than London. This reflects the strength of its multiplier effects. The region records the second highest indirect multiplier, at 0.73, and the second highest induced multiplier, at 0.57.

As a result, the South East's aggregate employment multiplier stands at 2.30, supporting 104,100 workers in 2023, of which 45,000 are directly employed within the heritage sector. London is not far behind, however, supporting 103,900 roles within the region, of which 50,000 are direct heritage sector roles.

As with GVA, the West Midlands records the lowest aggregate employment relative to its direct contribution, with a multiplier of 2.03 compared to a national average of 2.23. This is driven primarily by its comparatively low induced employment multiplier, at 0.32. This means that for every 10 job roles directly supported by the heritage sector in the West Midlands, approximately three additional jobs are sustained elsewhere in the regional economy due to the wider spending of direct and induced employees.

Figure 21: GVA per employee by impact layer, 2023, £ '000s at 2023 prices

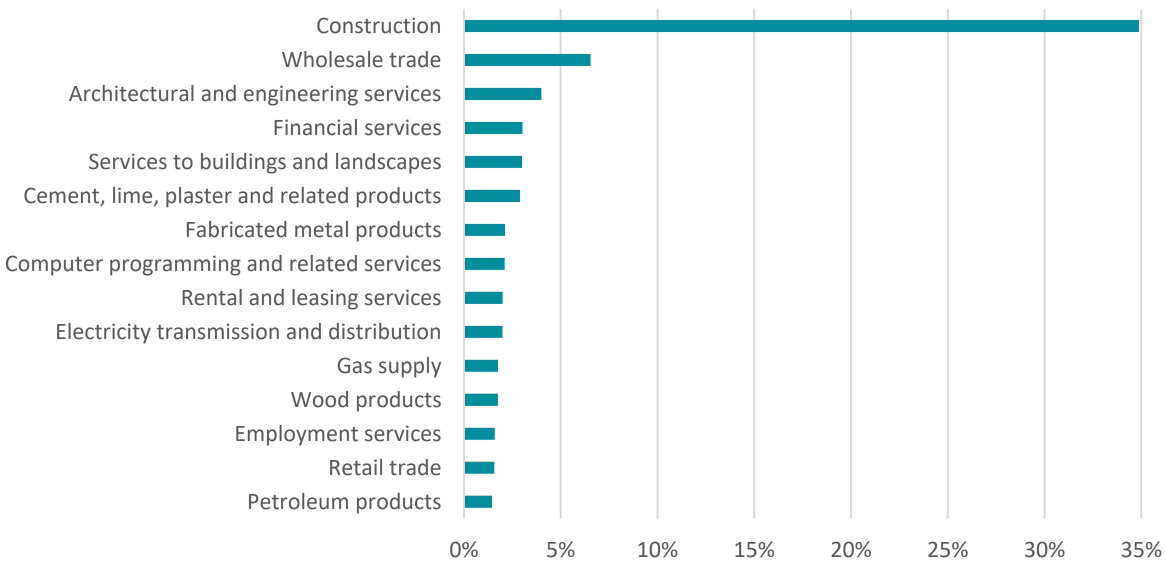


Sources: ONS, Cebr analysis

We conclude this section with a discussion of the gross value added per employee in each impact layer supported by the heritage sector in 2023, as presented in Figure 21, above. Direct employees within England's heritage sector generate £63,000 in GVA per worker. Jobs supported within the sector's supply chains generate higher average GVA per worker, at £75,000. Induced employment supported through employee spending supports the highest GVA per worker, at £83,000.

Figure 22 presents the major industries forming part of the heritage sector's supply chains, which contribute to the productivity levels discussed above.

Figure 22: Heritage sector supply chain spending with fifteen largest supplier industries, 2023 (% of total supply chain spending)



Sources: ONS, SRS, Cebr analysis

The construction sector is by far the largest recipient of heritage sector supply chain spending, accounting for 35% of total spending. This is driven primarily by expenditure within heritage-related construction SIC codes on goods and services from other (non-heritage) construction activities. Notably, non-heritage construction SIC codes exhibit relatively high productivity, with average GVA per job of approximately £101,000, compared to £63,000 across direct heritage SIC codes. As a result, heritage sector spending supports a disproportionate level of activity in higher-productivity areas of the economy. A similar pattern is observed in many of the sectors from which the heritage sector purchases inputs, such as the wholesale trade sector, which receives around 7% of heritage supply chain expenditure. Jobs supported in this sector generate an average of £88,000 in GVA per worker, further contributing to an uplift in the overall productivity supported by heritage sector spending.

On average, including direct, indirect and induced roles, the jobs supported by heritage sector activity each generate £71,000 in GVA. This demonstrates the value of the heritage sector in supporting higher-productivity industries elsewhere in the economy.

6. Spillover impacts of the heritage sector through tourism

Besides directly generating employment and GVA, England's heritage sector also supports additional economic activity in two other ways. Firstly, many tourists visit the UK with the primary intention of visiting heritage sites. Secondly, many others take part in heritage-related activities during trips that are made with another primary purpose. The cumulative spending on the heritage components of such trips contributes substantial amounts to national and local economic output, supporting thousands of additional jobs.

In this section, we present a series of descriptive statistics on domestic heritage-related overnight trips and day visits, as well as international heritage-related trips, and the corresponding spending generated by these trips.

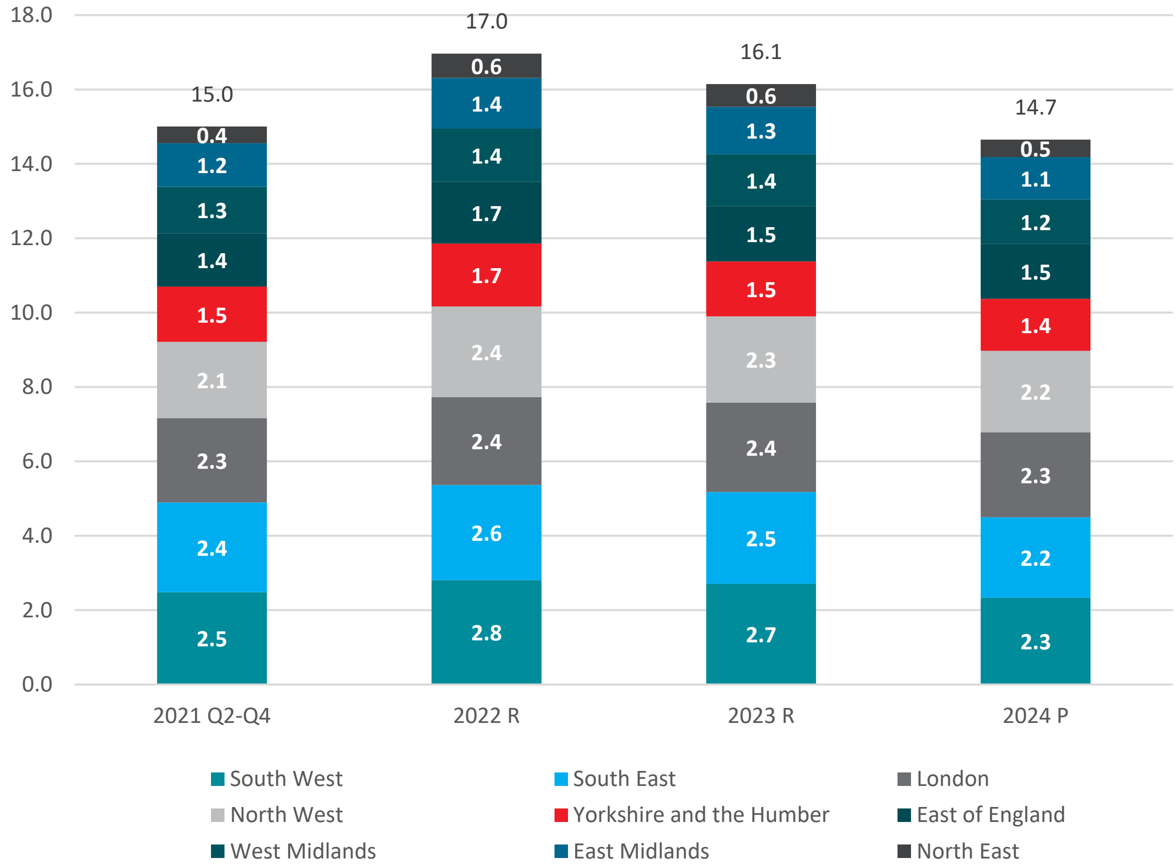
The methodology applied to determine heritage-specific tourism utilises an activities-based categorisation of tourist trips to estimate the appropriate portion of total expenditure and visits due to the heritage sector.[8] We derive expenditure and visitor number estimates from Visit Britain's Great Britain Tourism Survey (GBTS) and Great Britain Day Visits Survey (GBDVS), as well as the ONS's International Passenger Survey (IPS).

6.1 Domestic overnight tourism

The number and value of heritage-related trips with overnight stays by domestic visitors are drawn from the GBTS. We present results from the last three quarters of 2021 to 2024 in Figure 23, overleaf. As with all versions of this analysis since 2020, results for 2020 onwards are not comparable to those up to 2019 presented in past reports due to the change in survey methodology employed by the GBTS. Also note that, since the last study, GBTS estimates for 2022 and 2023 have been revised, denoted here with 'R', and only provisional estimates were available for 2024 at the time of analysis, denoted here with 'P'.

[8] A detailed breakdown of trip purpose is only available up until 2015. To form our estimates past this date, the proportion of heritage related trips in 2015 is applied to total domestic trips.

Figure 23: Domestic overnight trips, 2021–2024, millions



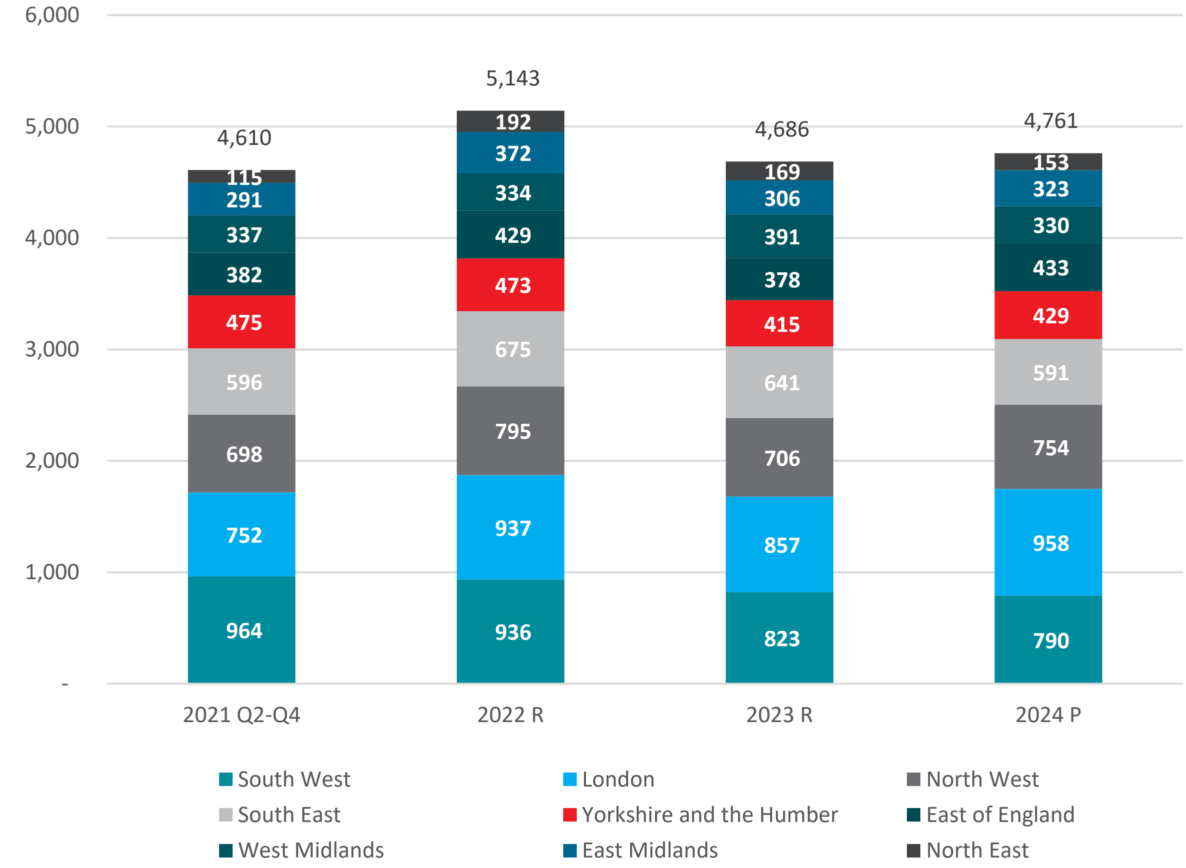
Sources: Visit Britain, Cebr analysis

In 2024, it is estimated that 14.7 million heritage-related trips were taken involving overnight stays by domestic visitors in England. This represents a 1.4 million decline (9%) on 2023. This continued decline on 2022 could reflect several trends: firstly, that the post-pandemic high of 17 million trips was a temporary surge in response to the lifting of all lockdown restrictions; secondly, British tourists are cutting back on domestic travel in favour of greater travel abroad; and thirdly, domestic tourists could be cutting back on overnight trips altogether.

The South West remains the most popular destination for overnight heritage trips, at 2.3 million trips, however in 2024 this was almost matched by London and the South East.

The spending domestic tourists make to facilitate heritage-related trips in England represents a significant contribution to local economies home to heritage sites. Figure 24 reports the total visitor expenditure on such trips for Q2 2021–2024, adjusted for inflation to 2024 price levels.

Figure 24: Domestic overnight trip expenditure, 2021–2024, £m at 2024 prices



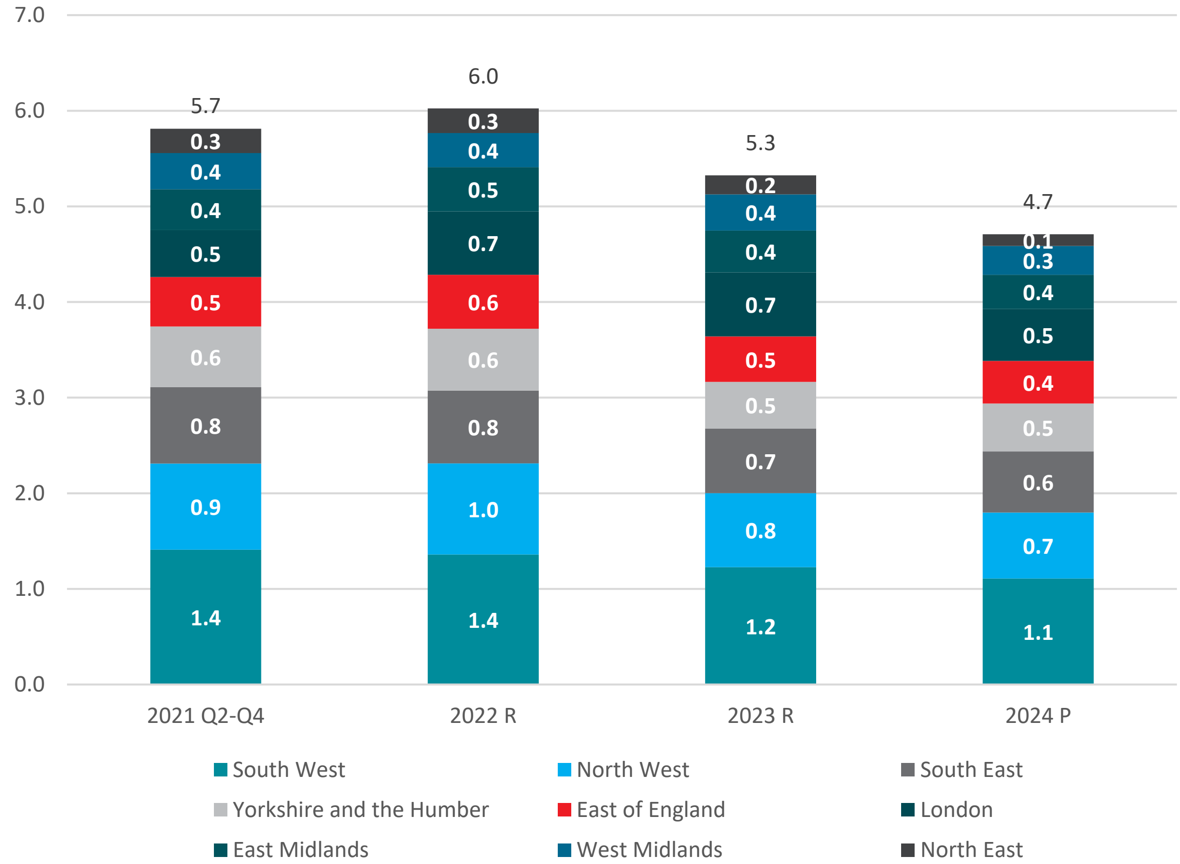
Sources: Visit Britain, Cebr analysis

Unlike the total number of trips taken, the value spent on overnight trips increased on 2023, although the total was still significantly lower than the 2022 peak. Spend on overnight trips increased by £75 million (2%) in 2024 to £4.8 billion, compared to the 2022 high of £5.1 billion. This trend is partially driven by the average spend per overnight trip increasing to £325 in from £290 in 2023 (in 2024 prices), a real-terms increase of 12%. Average spend per trip rose the most in London, increasing 28% in real terms.

While total trip spend in England increased marginally, this was not true across all regions. While London, the North West, Yorkshire and the Humber, East of England, and East Midlands all saw increases in overnight tourist expenditure, the South West, South East, West Midlands and North East all saw notable declines. In particular, the West Midlands saw a decline of 16%, while London saw an increase of 12% – for the third year running, London has led the regions in absolute overnight trip spend, and this lead is continuing to grow.

To gain a more disaggregated view of overnight trips, we consider holiday trips, which in this context exclude visits to friends and family for leisure purposes. Figure 25 presents domestic overnight holiday trip numbers between 2021 and 2024.

Figure 25: Domestic overnight holiday trips, 2021-2024, millions

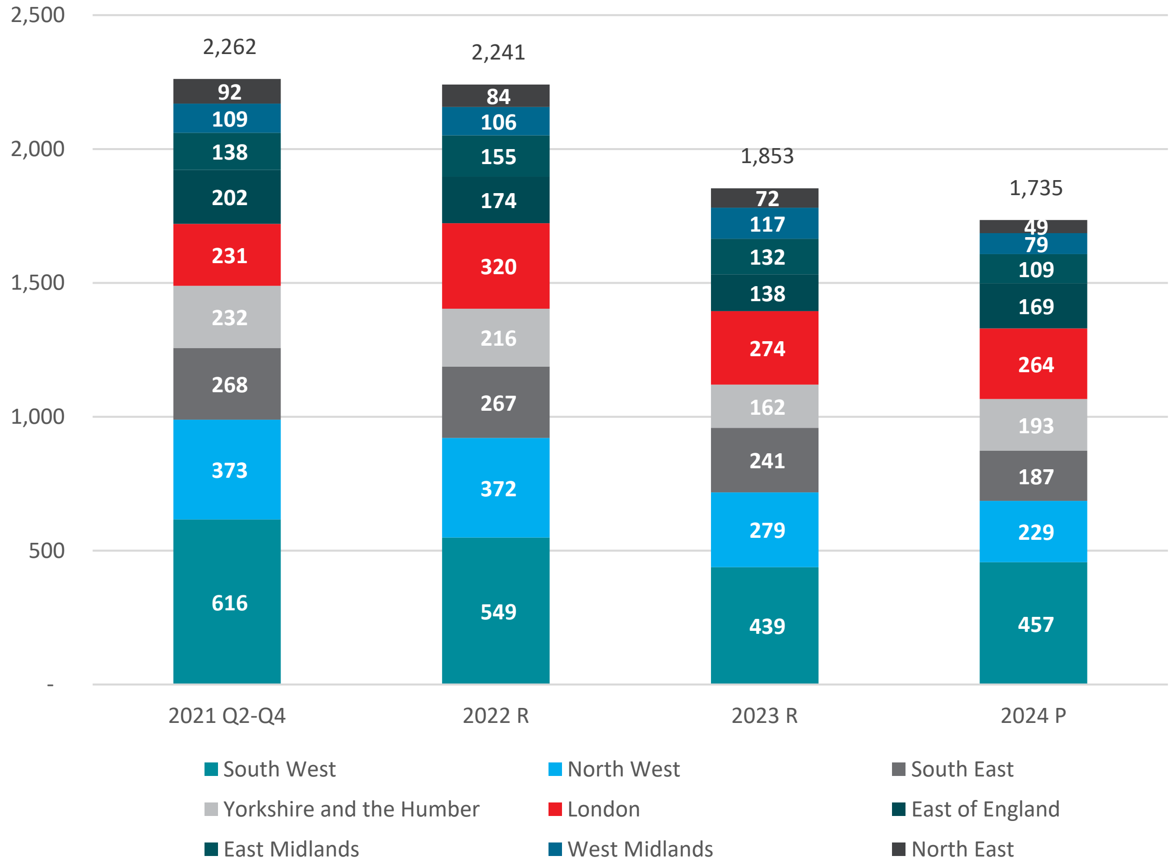


Sources: Visit Britain, Cebr analysis

In 2024 there were 4.7 million heritage-related holiday trips, representing approximately one third (32%) of total domestic overnight trips involving heritage visits. This is a notable decline of 0.6 million trips (12%) on 2023. Like the total number of overnight trips by region, the change in holiday trip numbers varied dramatically, although all but Yorkshire and the Humber saw a decline.

Figure 26 presents the expenditure associated with these overnight holiday trips, again adjusted for inflation to 2024 price levels.

Figure 26: Domestic overnight holiday trip expenditure, 2021–2024, £m at 2024 prices



Sources: Visit Britain, Cebr analysis

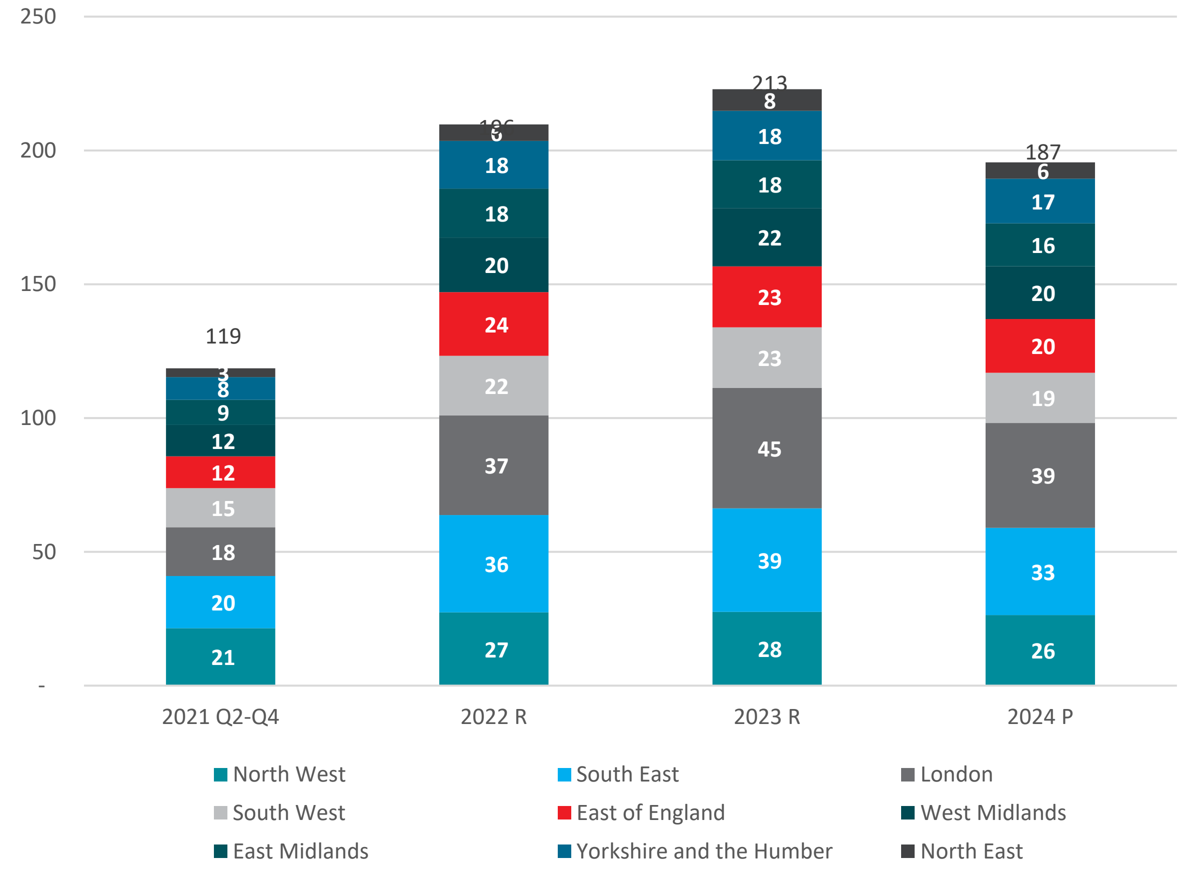
In 2024, total spending on heritage-related holidays fell £119 million (6%) in real terms to £1.7 billion across England. This decline was again unevenly distributed across the English regions: the East of England saw the strongest relative increase in heritage holiday spend (23%), while the West Midlands and North East jointly saw the worst relative declines (32%). Only the East of England, Yorkshire and the Humber and the South West saw increases in holiday trip spend in real terms.

The relative decline in holiday trip spending was therefore approximately twice the relative decline in holiday trip numbers. This indicates a significantly lower average spend per trip in 2024 than 2023, suggesting that domestic holidayers are not only reducing the number of trips they take but the amount they spend while on each trip.

6.2 Domestic day visits

In addition to overnight heritage tourism trips we also consider day visits, drawing on Visit Britain's Great Britain Day Visit Survey (GBDVS). A day visit is defined as one that takes place outside the respondent's place of residence, lasts at least three hours, and involves one of 15 designated leisure activities. Visits that are part of a regular routine are excluded, as are sporting events and certain other visitor attractions.[9] Figure 27 presents the number of heritage-related day trips taken between 2021 and 2024, broken down by region.

Figure 27: Domestic day visits, 2021–2024, millions

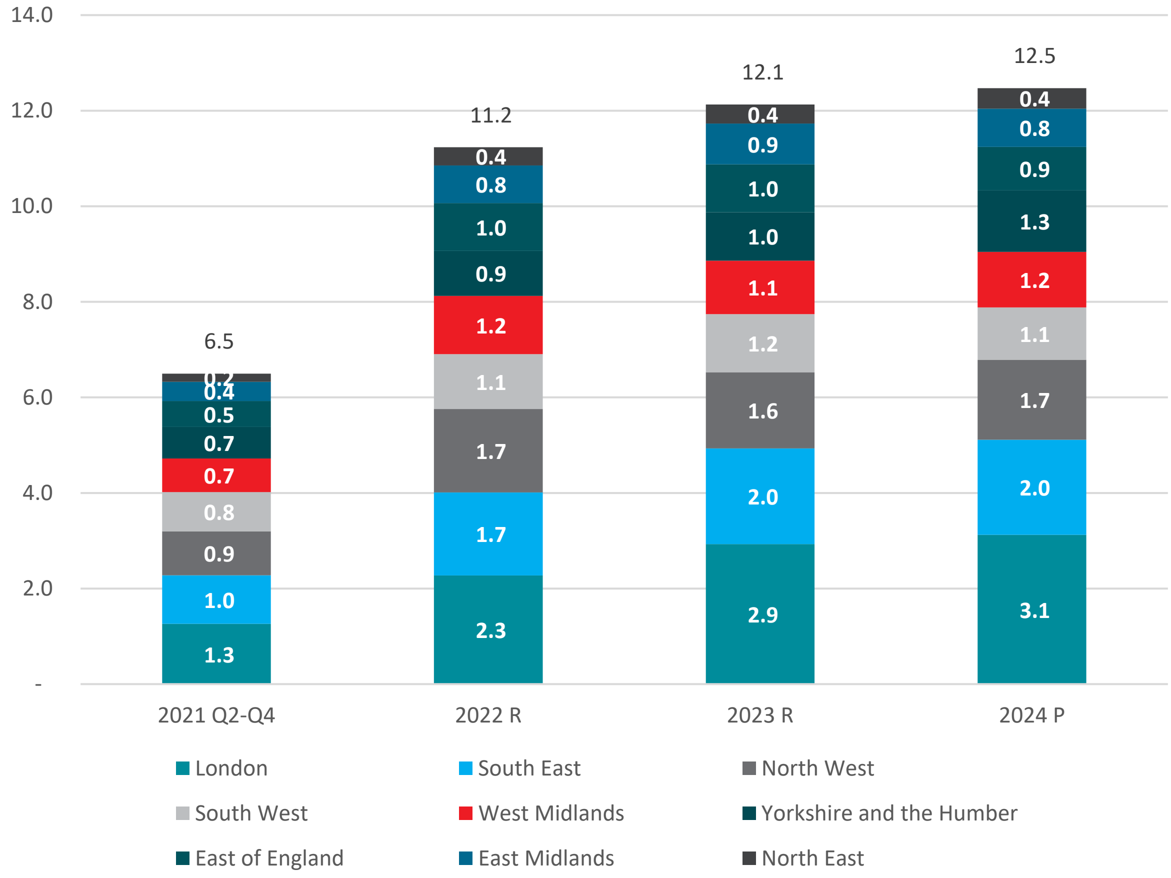


Sources: Visit Britain, Cebr analysis

Domestic heritage-related day visits declined 26 million (12%) from a 2023 high of 213 million to 187 million in 2024. While all nine English regions saw a decline in day visits, the North East was the relatively worst affected, with trip numbers declining by almost one quarter (24%). The North West, however, was the region with the smallest relative decline in day visits, at just 4%, and was the only region to see a decline in visits of less than 9%. Other regions with significant declines include the South West (17%), the South East (16%) and London (13%).

[9] For a complete definition and more information please see [Visit Britain's GB Day visits Survey]

Figure 28: Domestic day visit expenditure, 2021–2024, £m at 2024 prices



Sources: Visit Britain, Cebr analysis

Despite the 12% decline seen in the number of day visits, expenditure on such trips rose 3% to £12.5 billion in 2024. This overall increase was almost entirely caused by the 27% increase in day visit expenditure in Yorkshire and the Humber, and the 7% increase in spending in London.

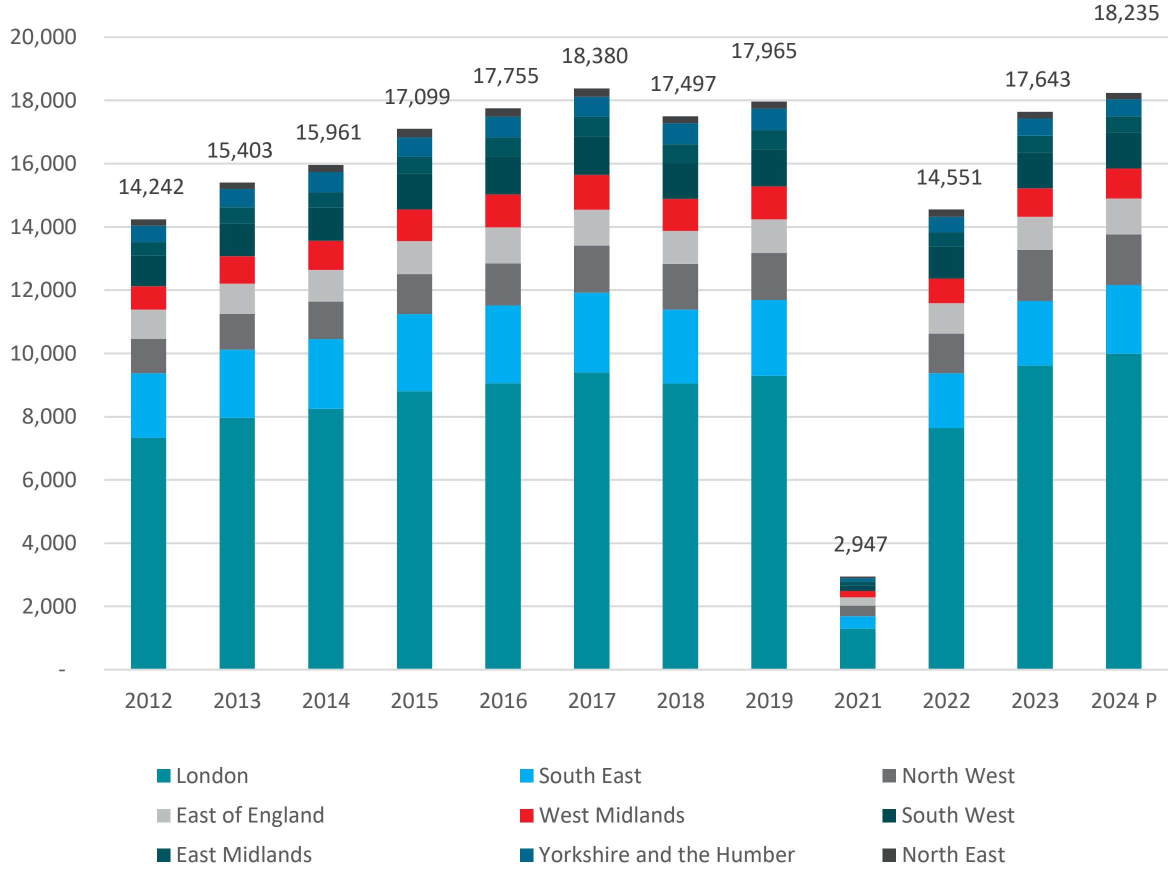
6.3 International tourism

In addition to domestic day visits and overnight trips, we also consider trips to English heritage sites by international visitors, using data from the International Passenger Survey (IPS).[10] We

10 The IPS collects information about individuals entering and leaving the UK and is used to produce estimates of overseas travel and tourism. It conducts between 700,000 and 800,000 interviews a year. Interviews are carried out at all major airports and sea routes, at Eurostar terminals and on Eurotunnel shuttle trains.

present results for international heritage visitor numbers and spending from 2012–2024 (excluding 2020).[11] Results are shown in Figure 29 and Figure 30 below.

Figure 29: Inbound international heritage visitors, 2012–2024, '000s



Sources: ONS, Cebr analysis

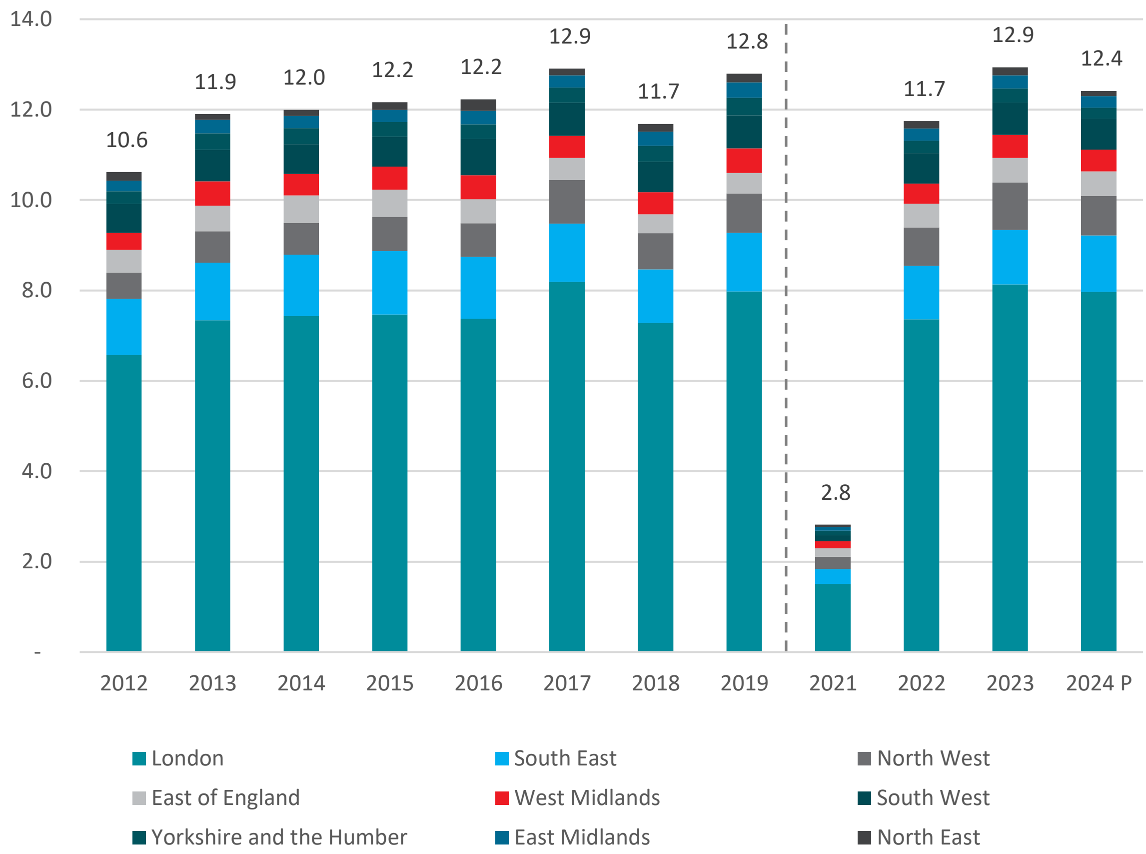
International visits with a heritage component in England grew 3% between 2023 and 2024, from 17.6 million in 2023 to 18.2 million in 2024. While London remained the favoured destination for international visitors (capital's share of total visits remaining steady at 55%), the strongest growth in visits was seen in the East of England (8% to 1.1 million visits), the South East (7% to 2.2 million) and the West Midlands (6% to 950,000 visits). The regions

[11] Note that the ONS is currently in the process of making improvements to the IPS methodology. As such results from Q3 2024 are classified as experimental statistics in development, meaning the full-year estimates for 2024 are provisional (indicated by P in figures) and may be revised in the future. Note also that a line break is shown between 2019 and 2021, because the IPS could not be run in 2020. Instead, administrative data were used to produce estimates. We do not present these here to be able to present a methodologically comparable time series.

which saw the largest declines were the North East (6% to 203,000), and Yorkshire and the Humber (2% to 531,000).

The trend in the expenditure associated with these international visits is more negative, however, as shown in Figure 30.

Figure 30: Inbound international visitor expenditure, 2012–2024, £bn at 2024 prices

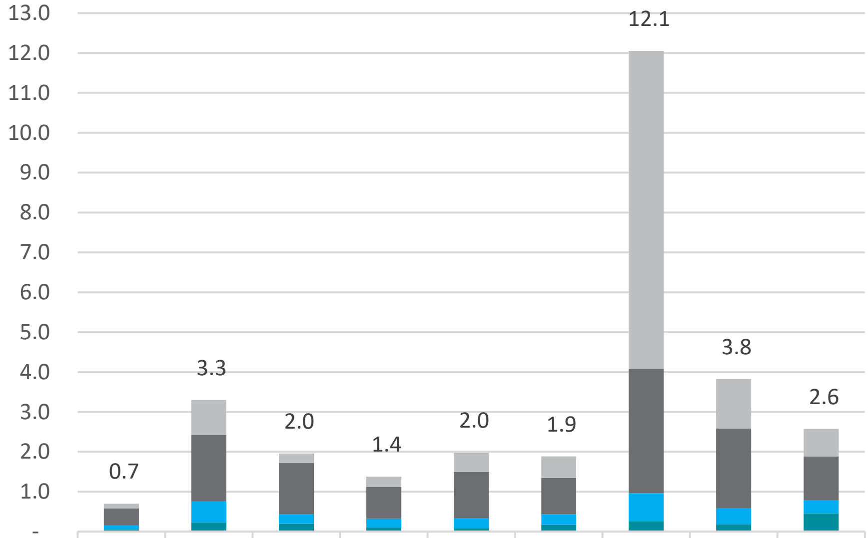


Sources: ONS, Cebr analysis

In real terms, visitor expenditure on heritage-related international trips declined 4% to £12.4 billion. Indeed, growth in expenditure was negative in all regions but the South East, which itself saw an increase in spending of only 3%. The worst-affected regions were again the North East (33% decline) and Yorkshire and the Humber (23% decline).

We conclude by summarising total regional heritage tourism spending in 2024, by type of trip, in Figure 31.

Figure 31: Total regional heritage tourism spending, 2024, £bn at 2024 prices



	North East	North West	Yorkshire and the Humber	East Midlands	West Midlands	East of England	London	South East	South West
International tourism	0.1	0.9	0.2	0.3	0.5	0.5	8.0	1.2	0.7
Domestic day visits	0.4	1.7	1.3	0.8	1.2	0.9	3.1	2.0	1.1
Domestic overnight non-holiday	0.1	0.5	0.2	0.2	0.3	0.3	0.7	0.4	0.3
Domestic overnight holiday	0.0	0.2	0.2	0.1	0.1	0.2	0.3	0.2	0.5
Total	0.7	3.3	2.0	1.4	2.0	1.9	12.1	3.8	2.6

Sources: ONS, Visit Britain, Cebr analysis

London once again leads the English regions in total spending on heritage-related tourism visits of £12.1 billion (41% of total). London leads in spending in all categories but domestic overnight holiday trips, with the South West leading there at £0.5 billion. Similarly, the North East continues to receive the least heritage-related tourism expenditure, at £0.7 billion, followed by the East of England (£1.9 billion), Yorkshire and the Humber and the West Midlands (£2.0 billion each). Outside of London, heritage-related tourism is particularly strong in the South East (£3.8 billion), the North West (£3.3 billion), and the South West (£2.6 billion.

For all regions but London, domestic day visits are the most important source of heritage tourism spending. In London, international visitors spend £8.0 billion alone, approximately twice the spending of all domestic visitors in the region and more than twice the spending of all heritage tourists combined in any other region.

Day visits are particularly important as a share of all tourism spending in Yorkshire and the Humber, the East Midlands and the North East. These regions receive relatively less expenditure from international visitor and domestic overnight visitors than others.

7. Appendix

Figure 32: Direct heritage GVA by region and SIC division 2023 (£m at 2023 price levels)

SIC Division	North East	North West	Yorkshire & Humber	East Midlands	West Midlands	East of England	London	South East	South West	England
43 Specialised construction activities	207	783	602	609	650	1,004	910	1,308	722	6,795
68 Real estate activities	58	169	110	80	119	139	581	249	139	1,645
91 Libraries, archives, museum activities	37	156	130	76	126	87	401	226	214	1,452
71 Architectural and engineering activities	16	85	43	38	65	117	156	142	68	730
41 Construction of buildings	36	82	63	61	50	101	168	122	62	744
84 Public administration and defence	27	70	51	38	50	50	132	98	75	591
81 Services to buildings and landscape activities	18	52	29	23	33	63	90	90	34	433
42 Civil engineering	14	54	30	25	40	58	65	65	29	380
94 Activities of membership organisations	15	37	24	22	36	20	165	55	21	396
50 Water transport	3	19	7	2	2	15	71	95	9	223
All other divisions	55	215	169	164	156	201	567	361	202	2,090
Total	**486**	**1,724**	**1,258**	**1,136**	**1,327**	**1,855**	**3,307**	**2,812**	**1,574**	**15,479**

Sources: ONS, Cebr analysis

Cebr