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The Importance of Our Past: Understanding the Economic Value of Heritage in the Eastern Arc Region



**EASTERN
ARC**
Academic Research
Consortium

The Eastern Arc Heritage and Culture Network brings together academics from the Universities of East Anglia, Essex, Kent and Sussex, along with heritage professionals, representatives of local authorities, and heritage and culture bodies, drawn from across the region.

easternarc.ac.uk/

The report was compiled by Professor David Gill.

Heritage and Tourism: From Norfolk to Sussex

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Introduction

The central aim of this report is to demonstrate the value of heritage on a regional basis, specifically the Eastern Arc area from the Wash to Sussex. The report seeks to contextualise heritage tourism within the wider regional economy. Such issues are important as the heritage sector is likely to be impacted by devolution and local government reorganisation that is currently under discussion (see The Heritage Alliance 2025). The report aims to inform regional-policy makers as well as heritage professionals. Support for heritage across the region should not be seen as a ‘luxury’ but rather as something beneficial for local communities. There are concerns that public funding for some heritage assets will be cut back and channelled into other services.¹

Furthermore, the data presented in this report show how the heritage sector has been impacted by the COVID-19 pandemic, and how the cost-of-living crisis appears to be having an impact on the recovery of visitor numbers. The data suggest some of the current trends in the type of heritage properties being visited.

The two main bodies of tourism data used in this report are drawn from the Association of Leading Visitor Attractions (ALVA) and Visit Britain.² We recognise some of the gaps and inconsistencies in the data. These include the insertion of new locations within the data sets, the dropping of data returns for other properties, and the way that different authorities present their data, not always on an annual basis. Thus, some of the charts and data will provide no more than an impression of visitor trends. Data for museums in the region have been supplemented by figures from Museum Development South East (Museum Development England 2024). A subsidiary aim of this report is to encourage evidence-based discussion about the contribution of heritage to our region.

Heritage locations are central to the attraction of the region for the Creative Industries sector, specifically for film.³ In turn this encourages visitors to the region: for example, there has been a marked interest in the Anglo-Saxon ship burial site at Sutton Hoo following *The Dig* filmed in Suffolk. This report seeks to encourage more dialogue between the Creative Industries and heritage sectors to optimise their use in projects.

The basis of this report is rooted in the series of county overviews prepared as a result of the RSA Heritage Index (The RSA 2020; Webster 2020): East Anglia [covering Norfolk and Suffolk] (Gill 2021a), Essex (Gill and Matthews 2021a), Kent (Gill and Matthews 2021b; Gill, Moore, and Winder 2022), and Sussex (Gill 2021b). These reports analysed the data by the component councils of the geographical counties, and placed heritage in a series of rankings, thus allowing local strengths (such as historic built environment; museums and archives; parks and open spaces; culture and

¹ E.g. Historic windmills in Kent: Finlay, et al. 2024.

² <https://www.alva.org.uk/>; <https://www.visitbritain.org/research-insights/england-visitor-attractions-latest>

³ E.g. Screen Suffolk: <https://screensuffolk.com/>; Screen Norfolk: <https://www.norfolkscreen.co.uk/>

memories) to be identified. Ten councils in the region are placed in the top 50 for heritage in England (out of 316): Norwich (3), Hastings (10), Southend-on-Sea (19), North Norfolk (25), Eastbourne (35), Tunbridge Wells (36), Maldon (37), Great Yarmouth (38), Rochford (40), Dover (49). Particular regional strengths included coastal defence, Christian heritage, historic houses, and historic landscapes and natural heritage. A wider regional overview of the social and economic contribution of heritage was presented that explored a number of key regional themes including the impact of climate on heritage, and heritage crime (Gill et al. 2022).

Some of the wider data include information for local authorities, while other data is presented for topographical counties that may include the formal county councils (e.g. Kent) as well as unitary authorities that rest within them (e.g. Brighton and Hove; Medway; Southend-on-Sea; Thurrock).

The Eastern Arc Heritage and Culture Network

The Eastern Arc Heritage and Culture Network brings together academics from the Universities of East Anglia, Essex, Kent and Sussex, along with heritage professionals, heritage and culture bodies, and representatives of local authorities from across the region.⁴

⁴ <https://easternarc.ac.uk/networks-groups-and-communities/>

Economic Value of Tourism

Heritage-led tourism is a major contributor to the UK economy both from international visitors, domestic day visitors and domestic overnight trips (Historic England 2024a). Specifically, heritage adds to the character of cities, towns, localities and regions. Heritage forms a key element in county and regional heritage and economic strategies (e.g. East Suffolk 2022; ctconsults 2024; West Sussex 2025).

According to the DCMS survey, 66 per cent of adults in England visited a heritage site in the last 12 months for the period May 2023 to March 2024 (Department for Digital Culture Media and Sport 2024). Historic England estimated that the heritage sector in England contributed £15.3 billion to the UK economy in 2022, of which £1.6 billion was from the East of England and £2.6 billion from the South-East (Historic England 2024b). These two regions are responsible for over a quarter of the national economic value of heritage (27 per cent); this value is the same as the whole of London (£4.2 billion). The average spend per visit to heritage locations is calculated at £55.

Research published by Historic England suggests that overseas visitors particularly favour visiting castles / forts (38 per cent) whereas historic houses are least popular (10 per cent) (Historic England 2024c). The data suggests that 13 / 12 per cent of visitors to heritage sites in the East of England and the South-East are from outside the United Kingdom (Historic England 2024c, 14).

The combined value of overall tourism for Essex,⁵ Kent,⁶ Norfolk,⁷ Suffolk⁸ and Sussex⁹ fell back to £12.0 billion in 2021 as a result of the COVID-19 pandemic. In 2023 the combined value was £18.3 billion, nearly back to the same level as 2019 (£18.4 billion).¹⁰ It is possible that the cost-of-living crisis is contributing to the holding back of the recovery of visitor numbers. Heritage forms a significant component of the tourism offer for these topographical areas.

⁵ Destination Research 2019a; Destination Research 2020; Destination Research 2021a; Destination Research 2022a; Destination Research 2023a.

⁶ Visit Kent 2019; Visit Kent 2020a; Visit Kent 2020b; Visit Kent 2022a; Visit Kent 2022b; Visit Kent 2022c; Visit Kent 2023.

⁷ Destination Research 2019b; Destination Research 2021b; Destination Research 2022b; Destination Research 2023b.

⁸ Destination Research 2019c; Destination Research 2021c; Destination Research 2022c; Destination Research 2024.

⁹ Blue Sail 2021; Blue Sail 2023.

¹⁰ The data for Essex, Kent, Norfolk and Suffolk are derived from reports prepared by Destination Research. The data for Sussex are prepared in alternate years by Blue Sail. The methodologies used by the wider counties are unlikely to be the same and therefore may lead to some inconsistencies. For the value of the cultural sector in Norfolk and Suffolk in 2018 (£272 million): Norfolk and Suffolk Culture Board 2022, 6.



Figure 1. Visit Britain poster campaign featuring heritage.

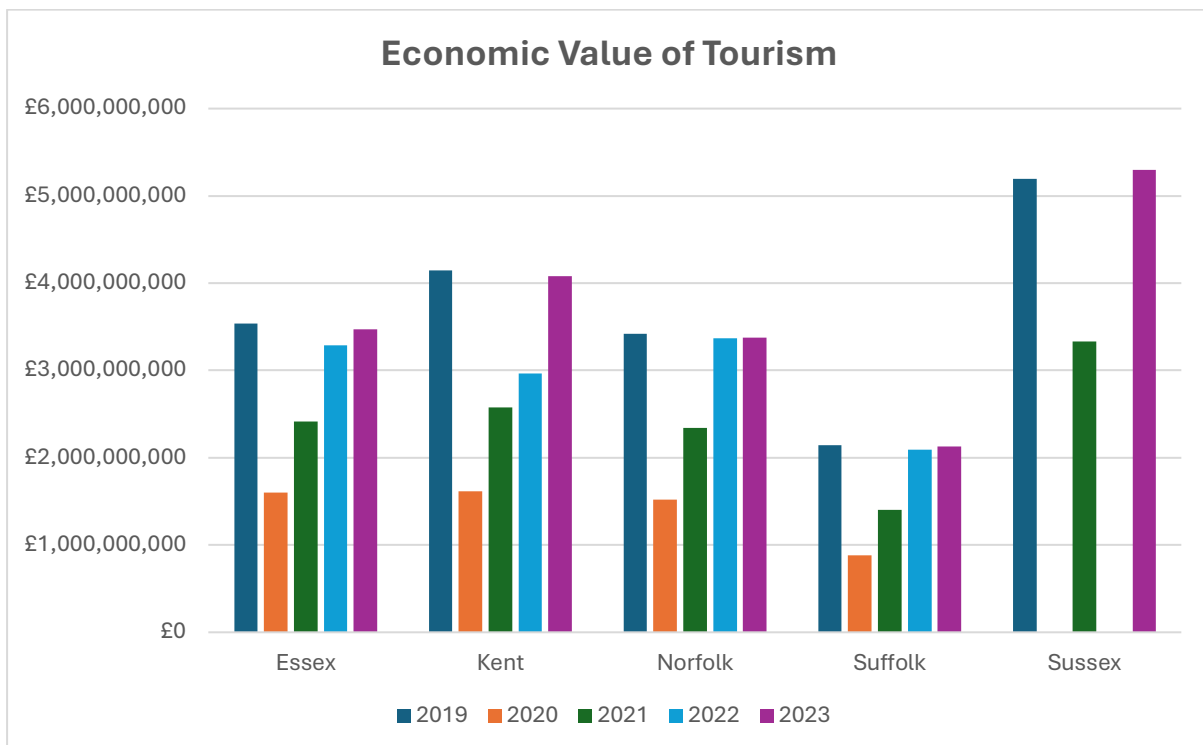


Figure 2. The estimated economic value of tourism. Note that Sussex uses a different methodology to the other four counties.

Participation in Heritage

Public engagement with heritage lies behind the value of the sector. The DCMS participation survey provides data for culture, heritage and museums (May 2023 – March 2024).¹¹ Participation equates with visiting a heritage site or museum in person in the last 12 months.

Brighton and Hove, East and West Sussex are the three authorities with the highest participation in heritage (79, 71 and 73 per cent) and with museums (61, 47, and 45 per cent). Thurrock was the lowest with 56 per cent and 33 per cent respectively.

Digital engagement with heritage and museums is also included in the survey. This is defined as engaging with heritage or museums digitally or online in the last 12 months. The survey will be influenced by the quality of the online presence of heritage sites or museums. The unitary authority of Brighton and Hove has the highest participation for digital heritage (31 per cent) and museums (19 per cent). Thurrock has the lowest participation with digital heritage (19 per cent) and Medway for digital museums (11 per cent).

These figures are influenced by the availability of heritage sites and museums in particular areas. Such data form part of the discussion of the potential for developing heritage in the RSA Heritage Index (Webster 2020).

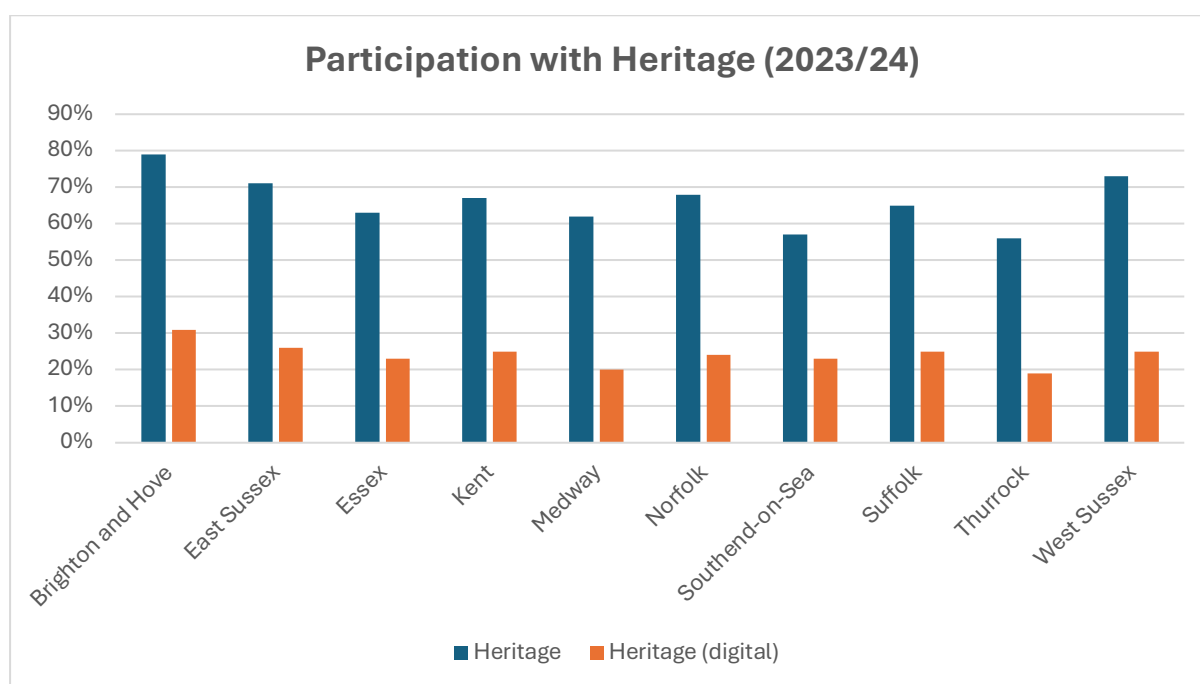


Figure 3. DCMS data indicating public participation with heritage, including through digital platforms, in 2023/24.

¹¹ <https://www.gov.uk/government/statistical-data-sets/participation-survey-ad-hoc-statistical-releases>

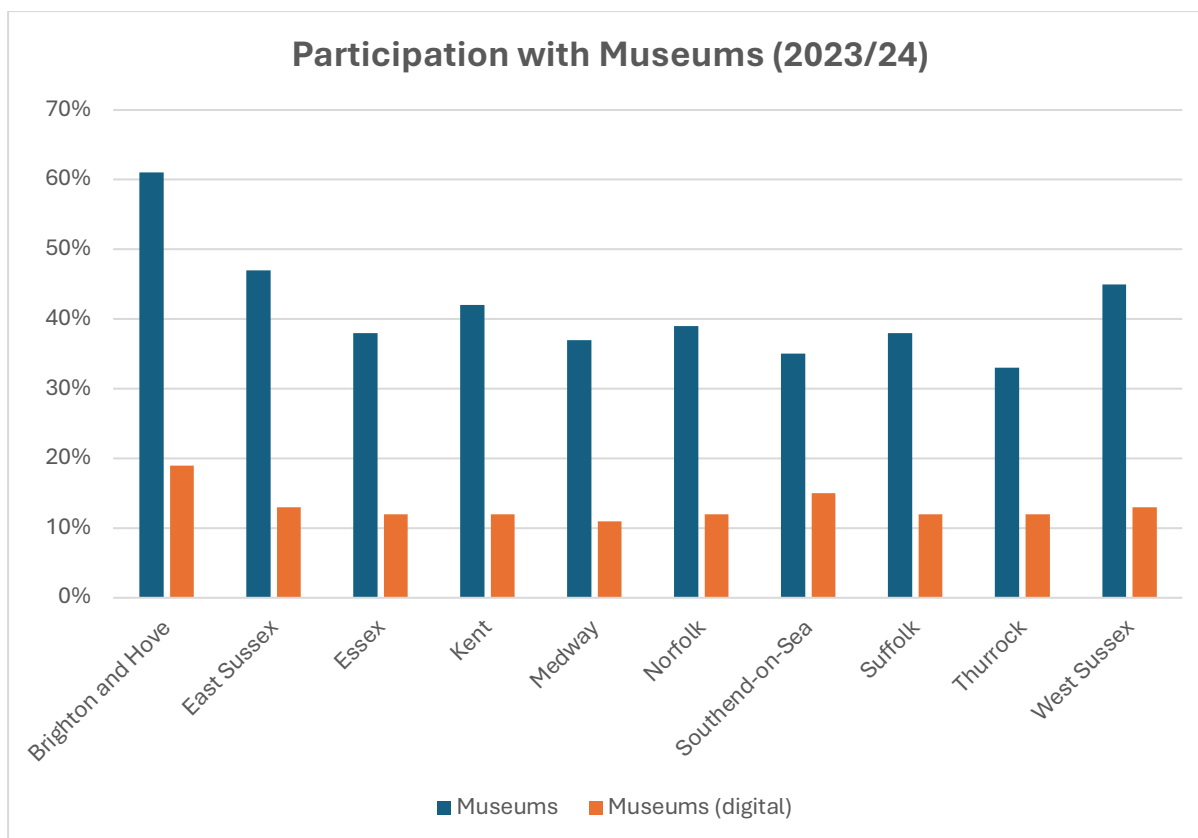


Figure 4. DCMS data showing public participation with museums in 2023/24.

Socio-Economic Backgrounds

The DCMS participation survey identified the social background of those participating in the survey. The highest participation rates were for higher managerial, administrative and professional occupations visiting parks or gardens (50 per cent), historic landscapes (47 per cent) and cities or towns with heritage assets (46 per cent). Heritage sites associated with sport had the lowest participation rates.

It is unclear if (and how) some of these areas overlap, for example visiting a medieval cathedral or ruined abbey as part of a trip to a medieval city or town.

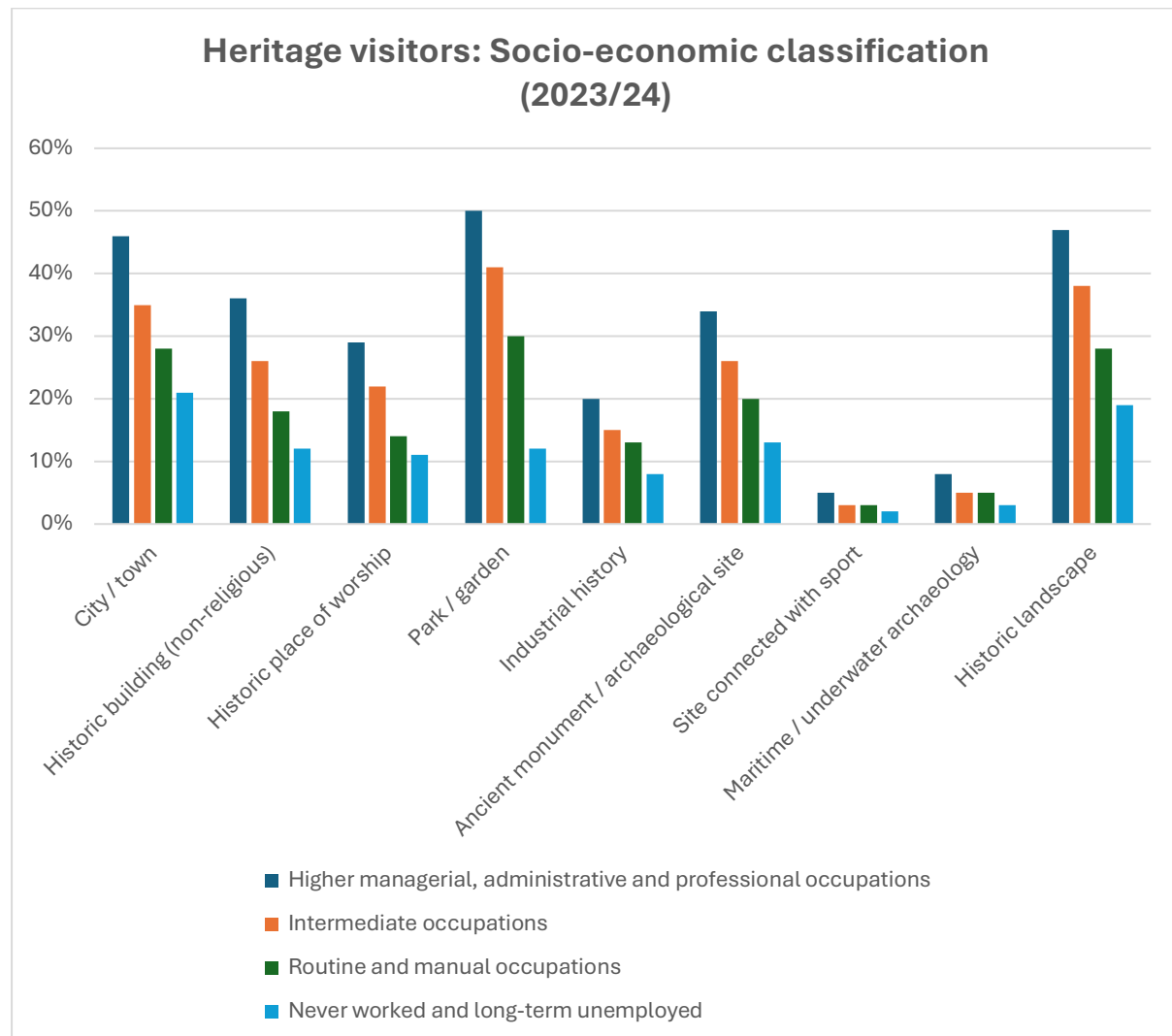


Figure 5. DCMS data showing socio-economic classification of visitors to heritage locations in 2023/24.

Ethnicity

The data for participation by ethnicity show that National Trust properties are the main type of heritage visited by all ethnic groups. Yet the different types of heritage sites are not evenly distributed across the country or even the Eastern Arc region, thus not providing an equal opportunity for visiting. For example, in the Eastern Arc region there is only one UNESCO World Heritage Site (Canterbury Cathedral, St Augustine's Abbey, and St Martin's Church).¹² National organisations such as English Heritage and the National Trust are more likely to attract visitors than smaller organisations.

These data are not equal in number for each ethnic group. Each set of data is a percentage of those contributing to the survey.

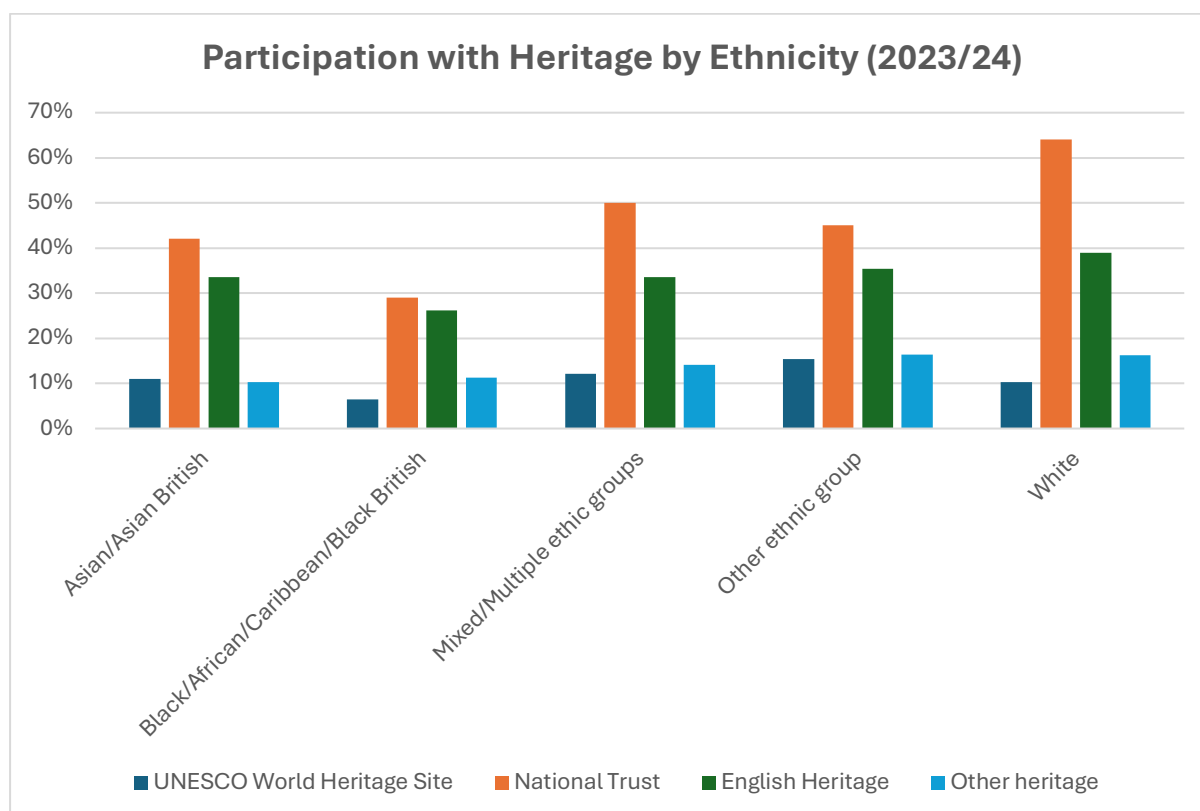


Figure 6. DCMS data showing public participation with heritage in 2023/24 by ethnicity.

¹² <https://whc.unesco.org/en/list/496/>. There is also one UNESCO City of Literature (Norwich): <https://www.citiesoflit.com/norwich>

Disability Status

The DCMS participation survey differentiated between disabled people and those without disability. Disabled people who were surveyed particularly engaged with parks and gardens (37 per cent), and historic landscapes (35 per cent). Access to historic buildings may be seen as a particular challenge for disabled people.

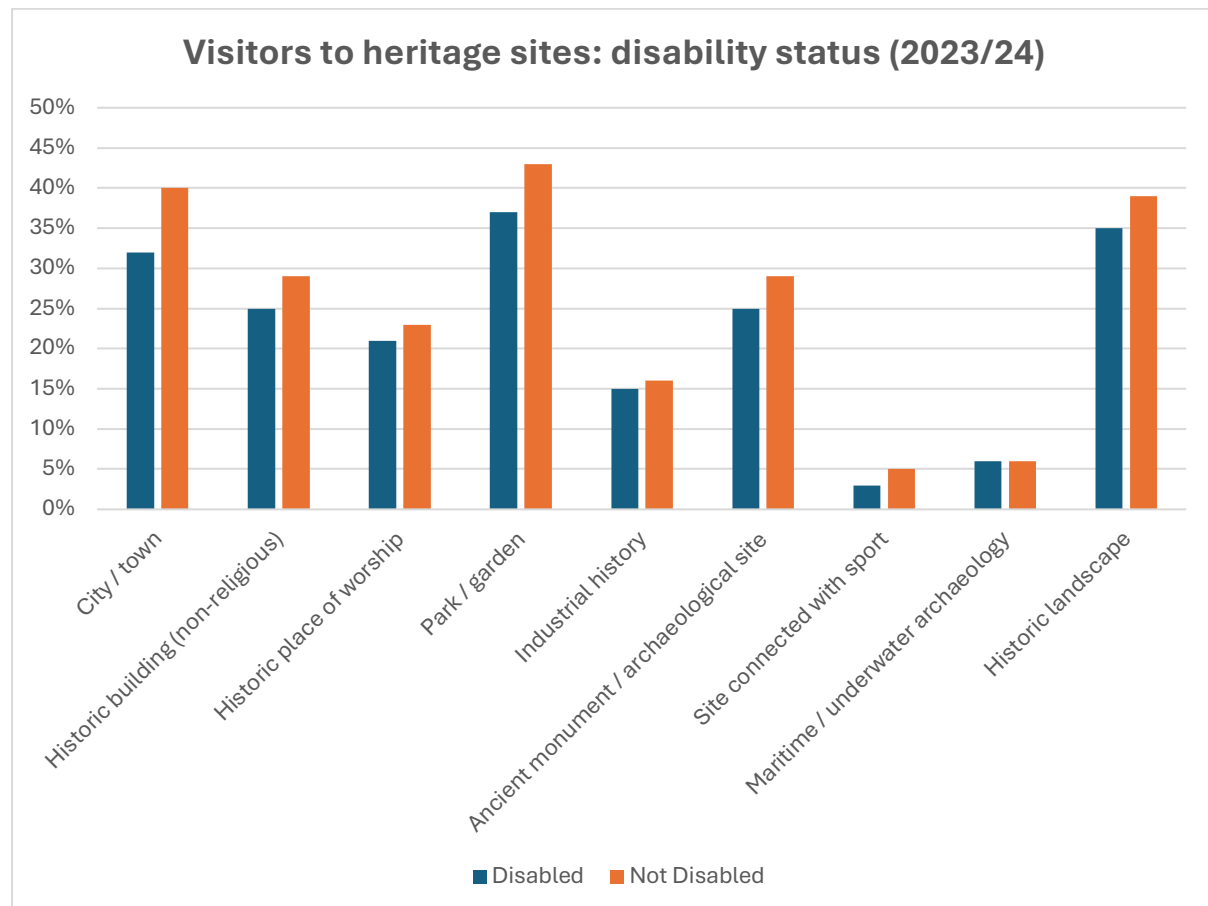


Figure 7. DCMS data showing participation of heritage by people with disabilities in 2023/24.

Regional Economies

Tourism should be considered against the wider economy of the region. It is clear that tourism, defined broadly, is a major contributor to the economies of each of the regional county economies. Heritage tourism forms a component of the tourism data. The populations of the individual counties and unitary authorities range from 1.85 million (Essex) to 176,000 (Thurrock).

Essex. Tourism is worth £3.2 billion, manufacturing £2.1 billion, and construction £4.7 billion.¹³ These figures for 'Greater Essex' include the unitary authorities of Southend-on-Sea and Thurrock. For an overview: Essex County Council 2024.

Kent. Tourism is worth £4.1 billion to the local economy (Kent Analytics 2025b), and accounts for 11.7% of all jobs across the county. Manufacturing in Kent represents £2.9 billion, construction £4.9 billion, and agriculture £1.6 billion (Kent Analytics 2025a).

Suffolk. Tourism is worth £2 billion. Manufacturing in Suffolk is worth £2.1 billion, manufacturing £2.1 billion, and agriculture £1.4 billion. Suffolk Observatory: <https://www.suffolkobservatory.info/>

Norfolk. Tourism is worth £3 billion. Manufacturing in Norfolk is worth £2.7 billion, construction £1.7 billion, and agriculture £1.1 billion. Norfolk Insight: <https://www.norfolkinsight.org.uk/>

Sussex. Tourism is worth £5 billion. Data for the economy are derived from East and West Sussex, and Brighton and Hove.¹⁴ Manufacturing is worth £4.3 billion, construction £2.6 billion, and agriculture £1.0 billion. Reports: Blue Sail 2021; Blue Sail 2023.

¹³ The data for agriculture were not obtained.

¹⁴ There are some missing data for some of the authorities so these figures may be slightly low.

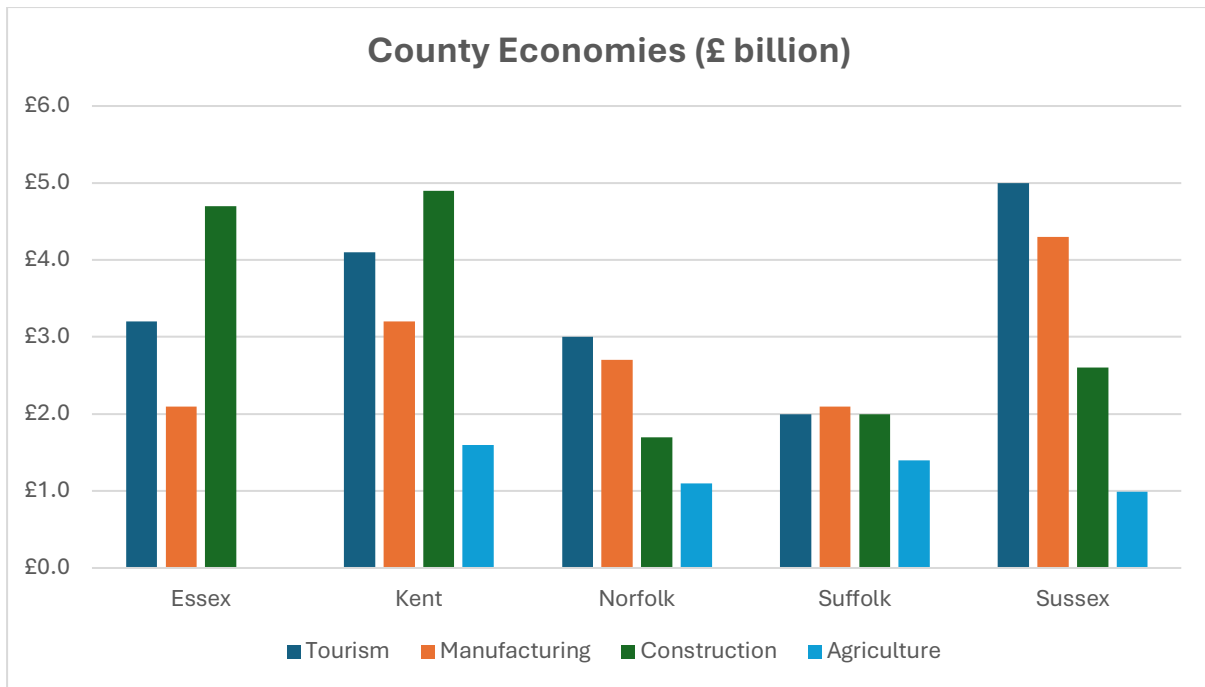


Figure 8. Indicative data comparing tourism with other parts of the county economies.

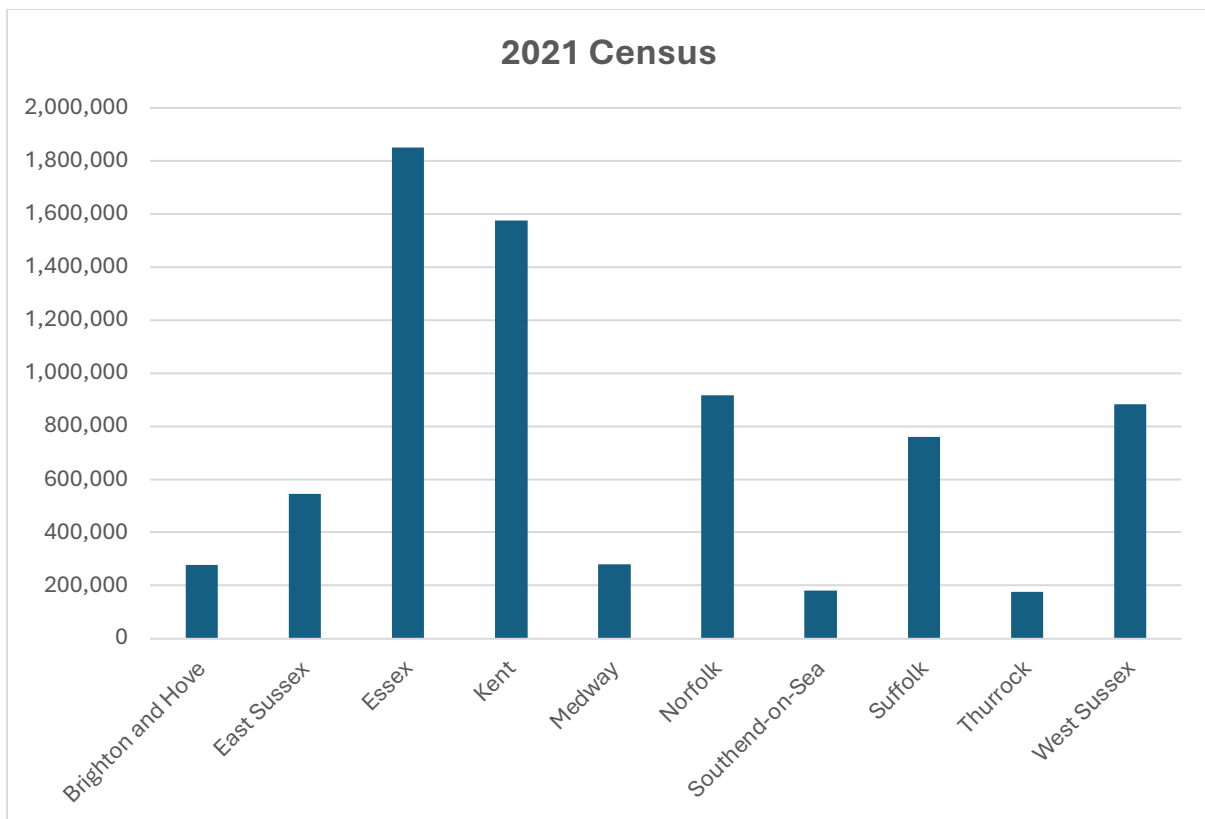


Figure 9. Populations for the counties and unitary authorities in Eastern Arc region. Data source: 2021 Census.

Leading Visitor Attractions

A select number of properties appear in the annual returns for the Association of Leading Visitor Attractions (ALVA). These properties have been selected to be part of ALVA, often as part of a larger organisation (e.g. English Heritage, Historic Royal Palaces). It should be noted that not all properties managed by larger organisations (e.g. The National Trust) appear in the ALVA data tables. These data allow for a broad overview of regional trends using the more prominent attractions as an indicator of visitor numbers.

Essex, Norfolk and Suffolk

Only four properties in these three counties appear in the ALVA return: Audley End (Essex), Blickling and Holkham Hall (Norfolk), and Ickworth (Suffolk). These represent English Heritage (Audley End), the National Trust (Blickling, Ickworth) and the Treasure Houses of England (Holkham). Only Ickworth and Holkham saw an increase in numbers between 2023 and 2024.

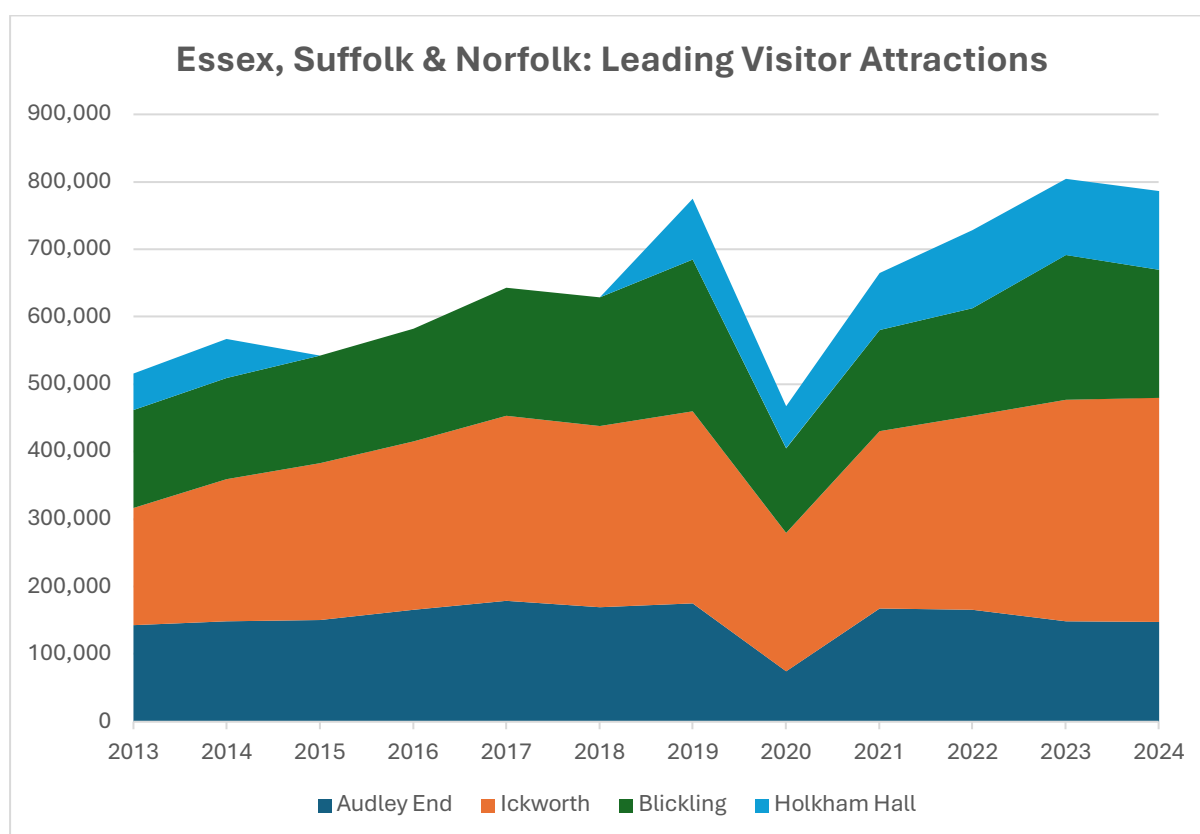


Figure 10. Data for leading visitor attractions in Essex, Suffolk and Norfolk.

Kent

Kent has seen a reduction in visitor numbers, in part due to a fall for Canterbury Cathedral which was over 1 million in 2013 and 2014 and now stands just under 660,000. Canterbury Cathedral is designated as a UNESCO World Heritage Site and is recognised as contributing to the wider economy (UNESCO 2020). The only properties showing an increase from 2023 to 2024 were Canterbury Cathedral and Knole. The properties in Kent represent English Heritage (Dover Castle, Walmer Castle), the National Trust (Chartwell, Knole, Sissinghurst) and the Treasure Houses of England (Leeds Castle).

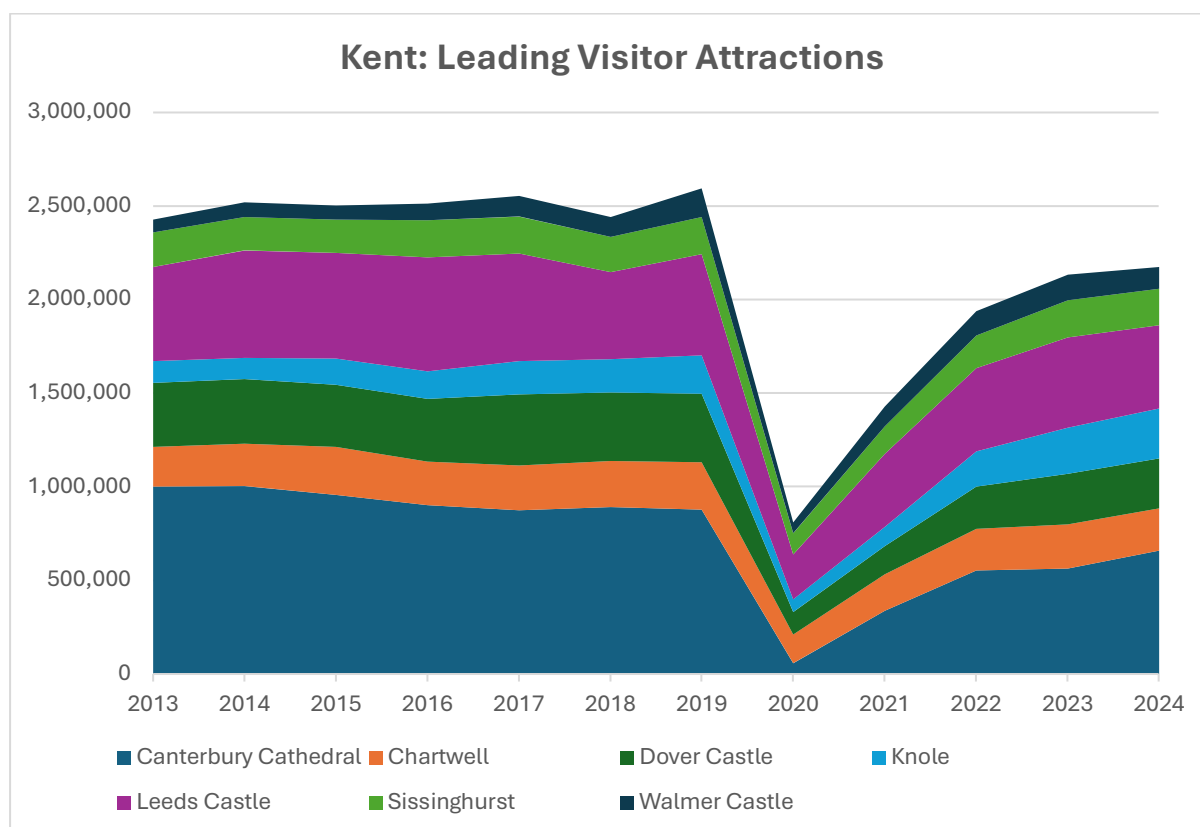


Figure 11. Data for leading visitor attractions in Kent.

Sussex

There has been a marked increase in numbers for Sussex in 2024 due to the inclusion of museums and galleries from Brighton and Hove: Booth Museum of Natural History; Brighton Museum & Art Gallery; Hove Museum of Creativity; Preston Manor & Gardens; Royal Pavilion. The overall trend of the other five properties is upwards, though 1066 Battle of Hastings saw a slight decrease in numbers from 2023 to 2024. These attractions represent English Heritage (1066 Battle of Hastings), and the National Trust (Nymans, Sheffield Park).

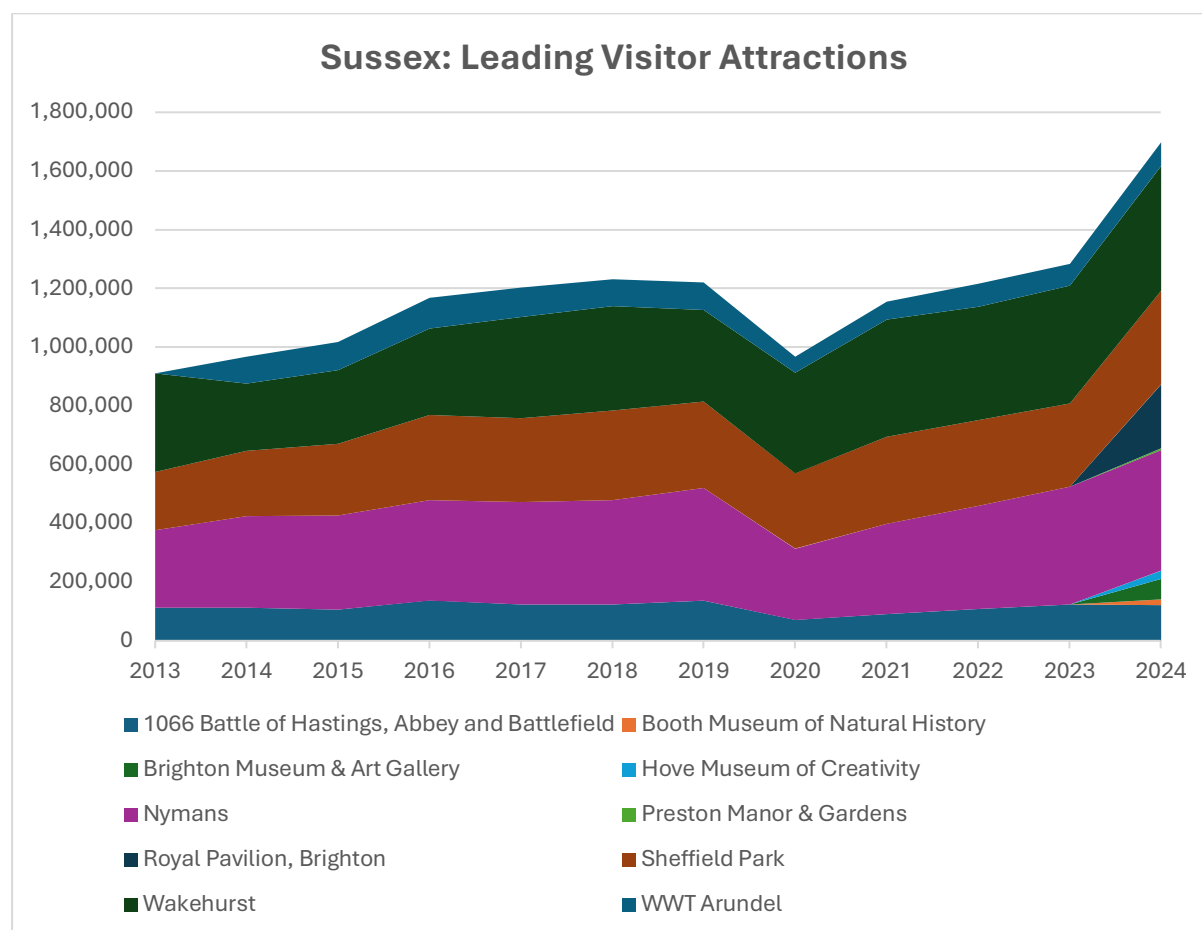


Figure 12. Data for leading visitor attractions in Sussex.

Visit Britain

Visit Britain prepares data for a range of visitor attractions across Britain. There is some inconsistency in the reporting of data and new locations are added to the lists. The data will be considered by county, by type of attraction, and for museums and art galleries. The choice of locations selected for the data returns is not made clear.

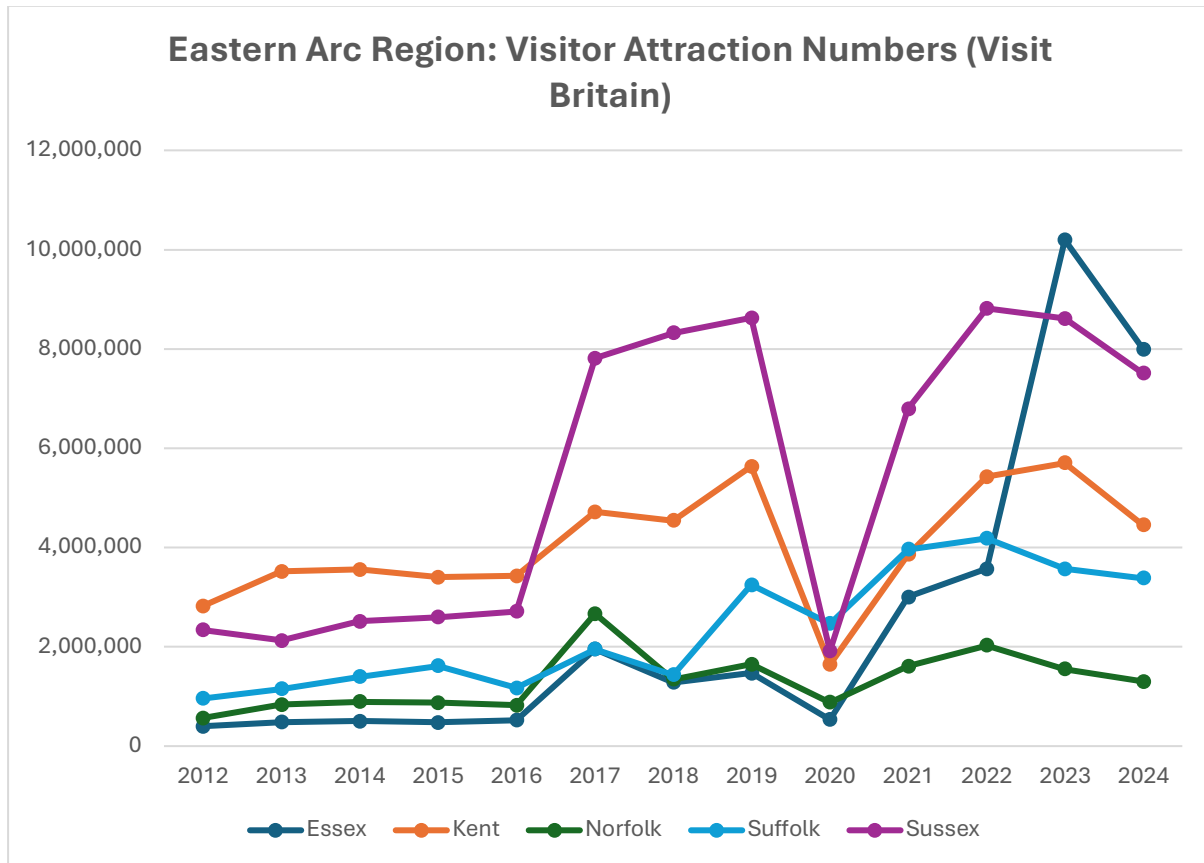


Figure 13. Visitor attraction numbers across the Eastern Arc region.

Essex

52 properties in Essex have been listed in the survey, and they attracted 8.0 million visitors in 2024. 5 of these attractions attracted more than 100,000 visitors in 2024, representing 7.8 million visits (out of 8.0 million):

Country Park: Lee Valley Regional Park (6,000,000).

Garden: Hyde Hall (RHS) (416,065).

Leisure / theme park: Adventure Island Southend (900,000).

Historic House: Audley End (147,701).

Other Historic Property: Southend-on-Sea Pier (305,566).

There were no properties with visitor numbers falling between 50,000 and 100,000.

Essex saw an increase in numbers in 2021 due to the inclusion of Adventure Island Southend (990,000), and in 2023 with the addition of Lee Valley Regional Park (6.8 million).

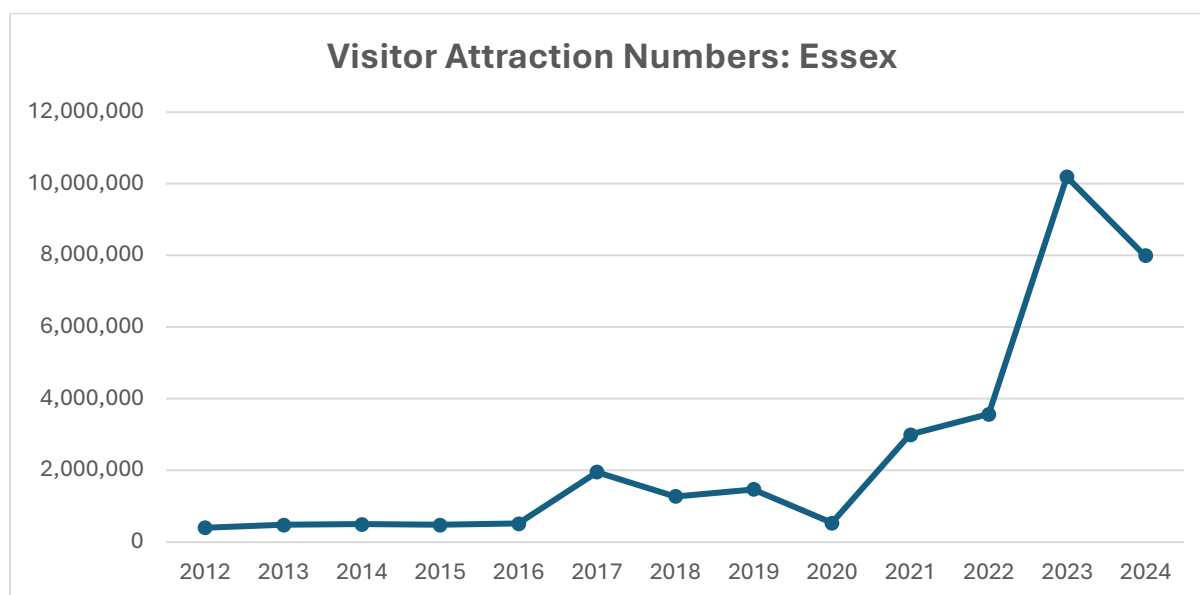


Figure 14. Visitor numbers for attractions in Essex.

Kent

72 properties in Kent have been listed, and they attracted 4.4 million visitors in 2024. 14 of these attractions attracted more than 100,000 visitors in 2024, representing 4.1 million (out of 4.4 million):

Castles: Dover Castle (267,320), Leeds Castle (444,015), Walmer Castle and Gardens (114,713).

Country Parks: Bedgebury National Pinetum and Forest (491,271), Jeskyns (301,687).

Gardens: Emmetts Garden (123,504), Sissinghurst Castle Garden (195,384).

Historic Houses: Chartwell (223,587), Knole (269,400), Scotney Castle (177,390), Ightham Mote (131,034).

Museums / Art Galleries: Tunbridge Wells Museum and Art Gallery / The Amelia Scott (331,600), The Beaney (355,602).

Place of Worship: Canterbury Cathedral (659,960).

There were no properties with visitor numbers falling between 50,000 and 100,000.

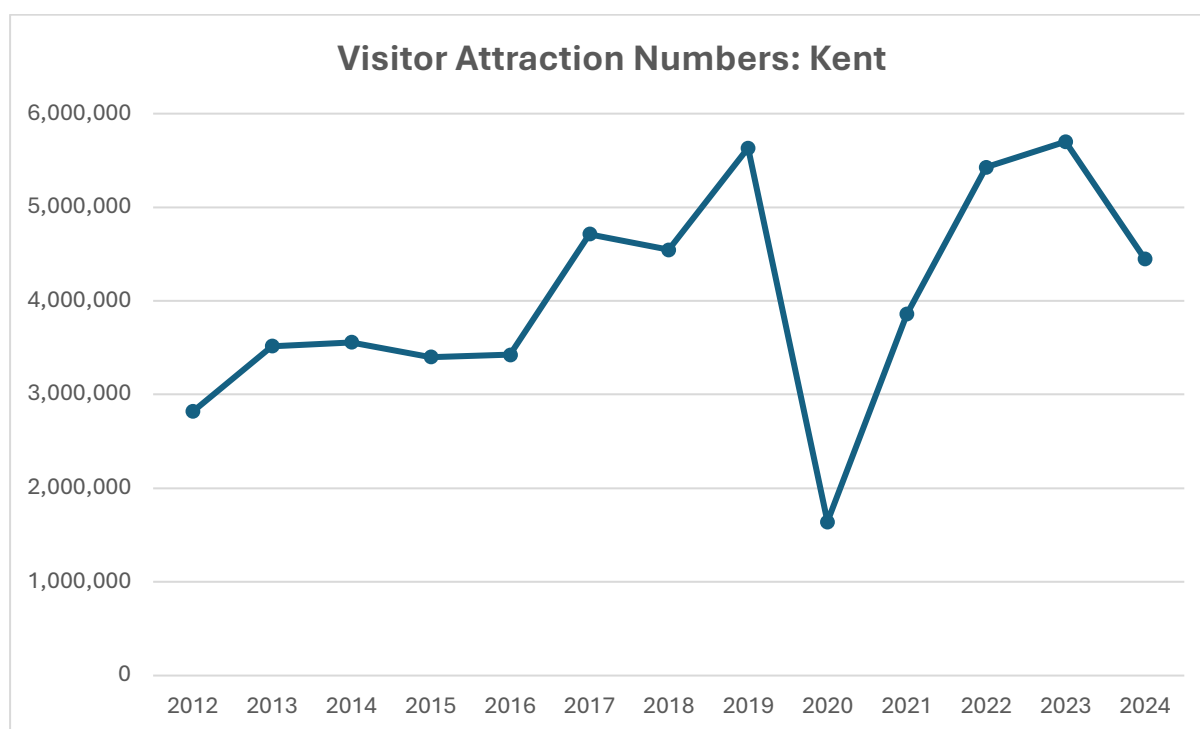


Figure 15. Visitor attraction numbers for Kent.

Norfolk

53 properties in Norfolk have been listed, attracting 1.3 million visitors in 2024. 7 of these attractions attracted more than 100,000 visitors in 2024, representing just under 1 million visitors (out of 1.3 million):

Leisure / theme parks: BeWILDerwood (161,530), Wroxham Barns (150,000).

Historic Houses: Blickling (189,202), Felbrigg (126,119), Holkham (116,398), Oxburgh Hall (105,560).

Scenic Transport: The Poppy Line (140,000).

There were no properties with visitor numbers falling between 50,000 and 100,000.

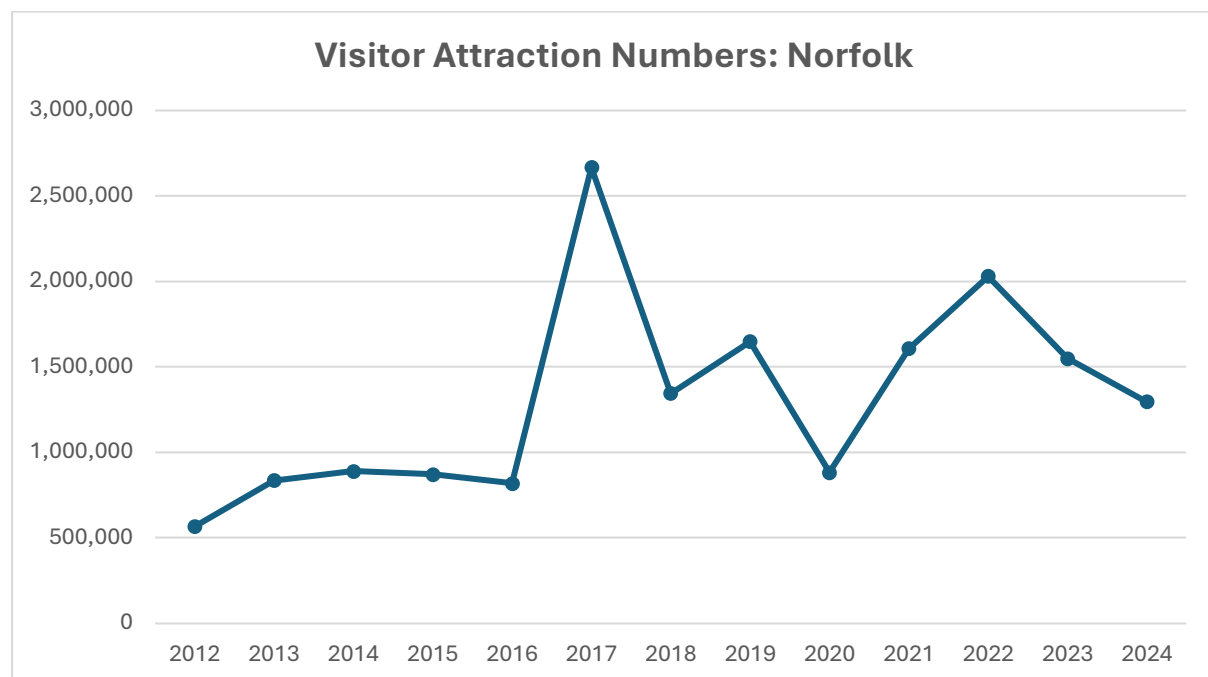


Figure 16. Visitor attraction numbers for Norfolk.

Suffolk

56 properties in Suffolk have been listed, attracting 3.4 million visitors in 2024. 6 of these attractions attracted more than 100,000 visitors in 2024:

Country Parks: Brandon Country Park (137,669), High Lodge Forest Centre (457,076), Nowton Park (350,248).

Historic House: Ickworth (332,701).

Historic Monument: Sutton Hoo (142,475).

Gardens: Bury St Edmunds Abbey / The Abbey Gardens (1,385,280).

The Abbey Gardens containing the ruins of Bury St Edmunds Abbey were classified as 'Place of Worship (still in use)', but St Edmundsbury Cathedral has a separate entry. The Abbey Gardens have now been moved into the category of Gardens.

4 properties in Suffolk attracted between 50,000 and 100,000 visitors:

Country Park: East Town Park (97,976).

Castle: Framlingham Castle (73,350).

Nature Reserve: Minsmere (RSPB) (85,000).

Place of worship: St Edmundsbury Cathedral (70,741).

The ten properties with more than 50,000 visits represented 3.1 million visits (out of 3.4 million).

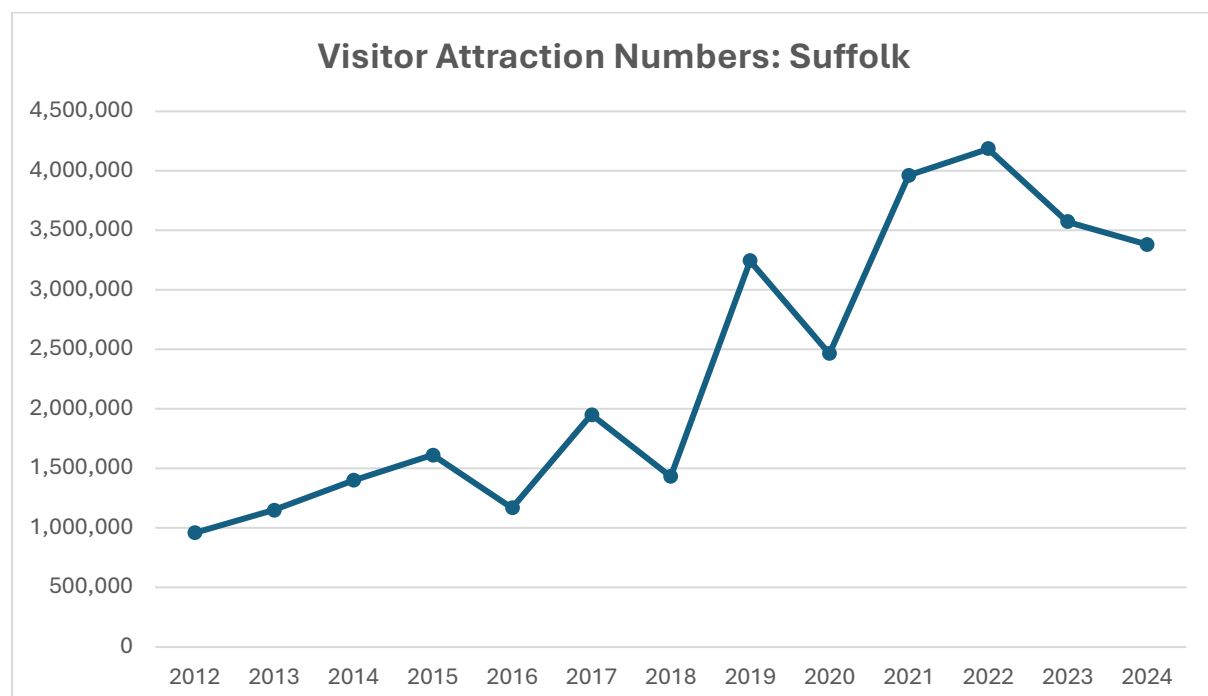


Figure 17. Visitor attraction numbers for Suffolk.

Sussex

70 properties in Sussex have been listed, attracting 7.5 million visitors in 2024. 14 of these attractions attracted more than 100,000 visitors in 2024:

Castle: Bodiam Castle (151,369).

Country Park: Seven Sisters Country Park (308,294).

Gardens: Nymans (410,711), Sheffield Park (319,138), Wakehurst (424,798).

Historic Monument: 1066 Battle Abbey (121,947).

Historic Houses: Batemans (119,525), Petworth (200,185), Royal Pavilion (221,960), Standen (130,068).

Leisure / theme parks: Fishers Adventure Farm Park (170,152), Knockhatch Adventure Park (260,957).

Other: Brighton Pier (3,961,226).

Place of Worship: Chichester Cathedral (258,534).

Three properties attracted between 50,000 and 100,000 visitors:

Museums / Art Galleries: Amberley Museum & Heritage centre (50,669), Brighton Museum & Art Gallery (69,795), Novium Museum (52,223).

The seventeen properties with more than 50,000 visits represent 7.2 million visitors (out of 7.5 million visitors).

The increase in visitor numbers in 2017 was due to the inclusion of Brighton Pier (4.7 million).

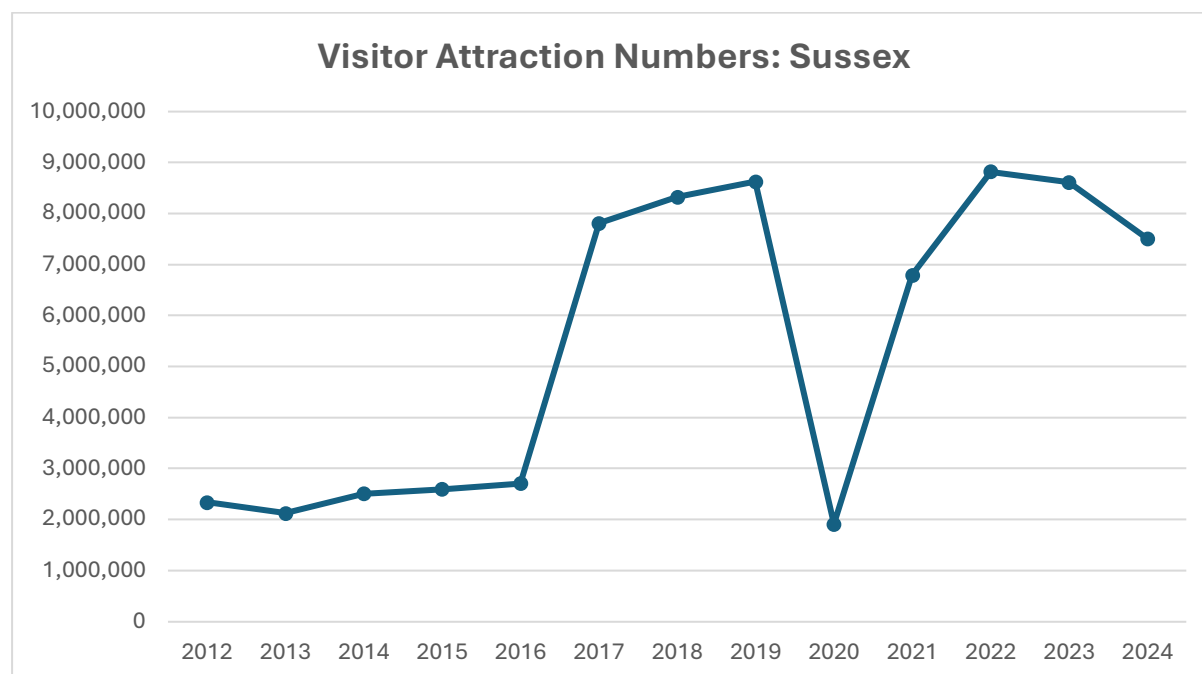


Figure 18. Visitor attraction numbers for Sussex.

Type of Attractions

Country Parks are the main attractions across the region, followed by gardens and historic houses. Historic Monuments are represented by two properties: 1066 Battle Abbey and Sutton Hoo. Places of Worship that continue to be in use are represented by three cathedrals (Church of England): Canterbury, Chichester, and St Edmundsbury (Bury St Edmunds). 'Other historic properties' are represented by Brighton Pier and Southend-on-Sea Pier.

Museums and Art Galleries that attracted more than 50,000 visitors only feature in the data for Kent and Sussex.

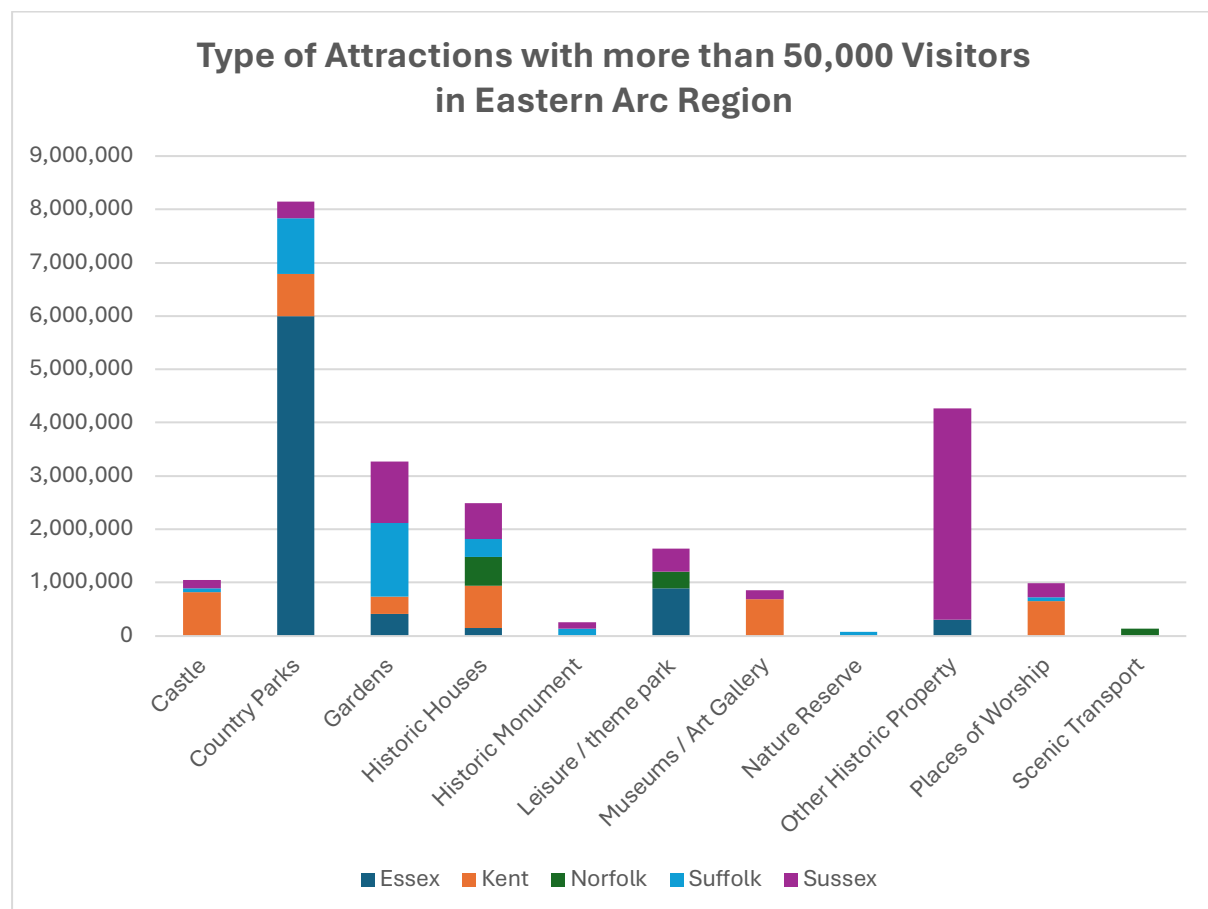


Figure 19. Attractions with more than 50,000 visitors in the Eastern Arc region.

Museums and Galleries

Museum numbers can be extracted from the data presented by Visit Britain. The large increase for Kent in 2022 is partly due to the inclusion of The Beaney (271,175 visitors in 2022), and the Amelia Scott (203,901 in 2022). The Sainsbury Centre at UEA was included in the data for 2022 and 2023 (128,750; 139,100) and that accounts for the increase in that period. The Weald and Downland Museum was included in the return for Sussex in 2022 and 2023 (130,000; 135,000).

The number of museums listed in the Visit Britain data for each county (with museums listed by Museum Development South East in brackets):

Essex:	21 (35)
Kent:	18 (44)
Norfolk:	21 (40)
Suffolk:	21 (35)
Sussex:	25 (51)

There is a shortfall of data presented for museums. For example, over 50 museums are represented by Museums Essex,¹⁵ and 70 by the Association for Suffolk Museums.¹⁶

The Annual Museum Survey provides further information about the museums, audience engagement and finances. The reports are presented by region and Eastern Arc falls within the South East (Museum Development England 2024).

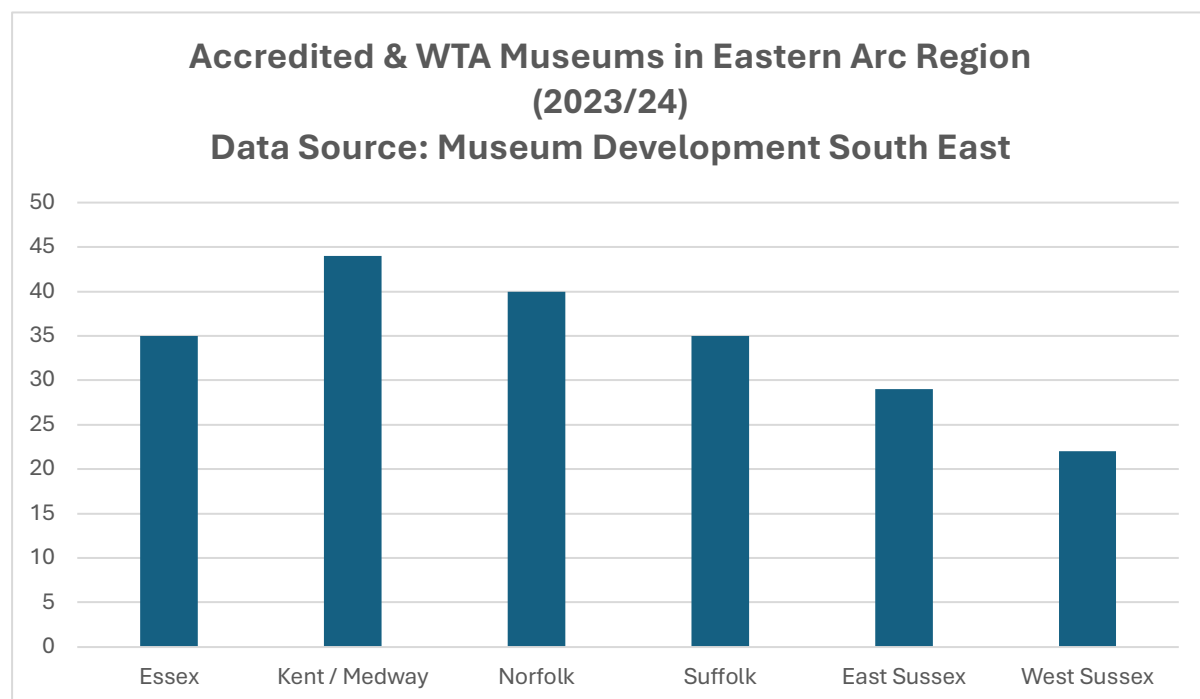


Figure 20. The number of accredited museums and those working towards accreditation (WTA) in Eastern Arc region. Source: Museum Development South East.

¹⁵ <https://museums-essex.org/membership/>

¹⁶ <https://suffolkmuseums.org/suffolk-museums-map/>

The data provided through Visit Britain are at variance with the annual return from museums collected through Museum Development South East (MDSE). The MDSE report represents a 40 per cent return of data from the 205 museums across the Eastern Arc region. Suffolk had the highest return with 70 per cent, and Kent / Medway the lowest with 23 per cent.

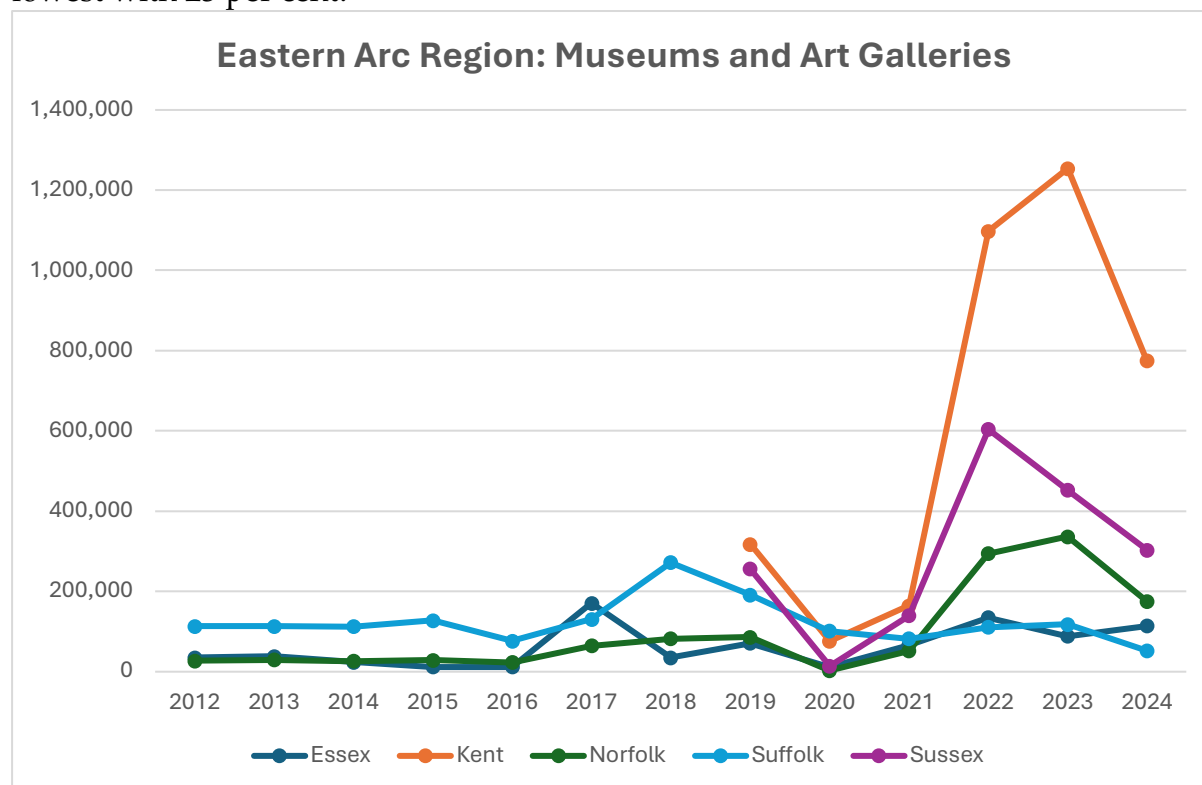


Figure 21. Visitor numbers to museums and galleries in Eastern Arc region. Data source: Visit Britain.

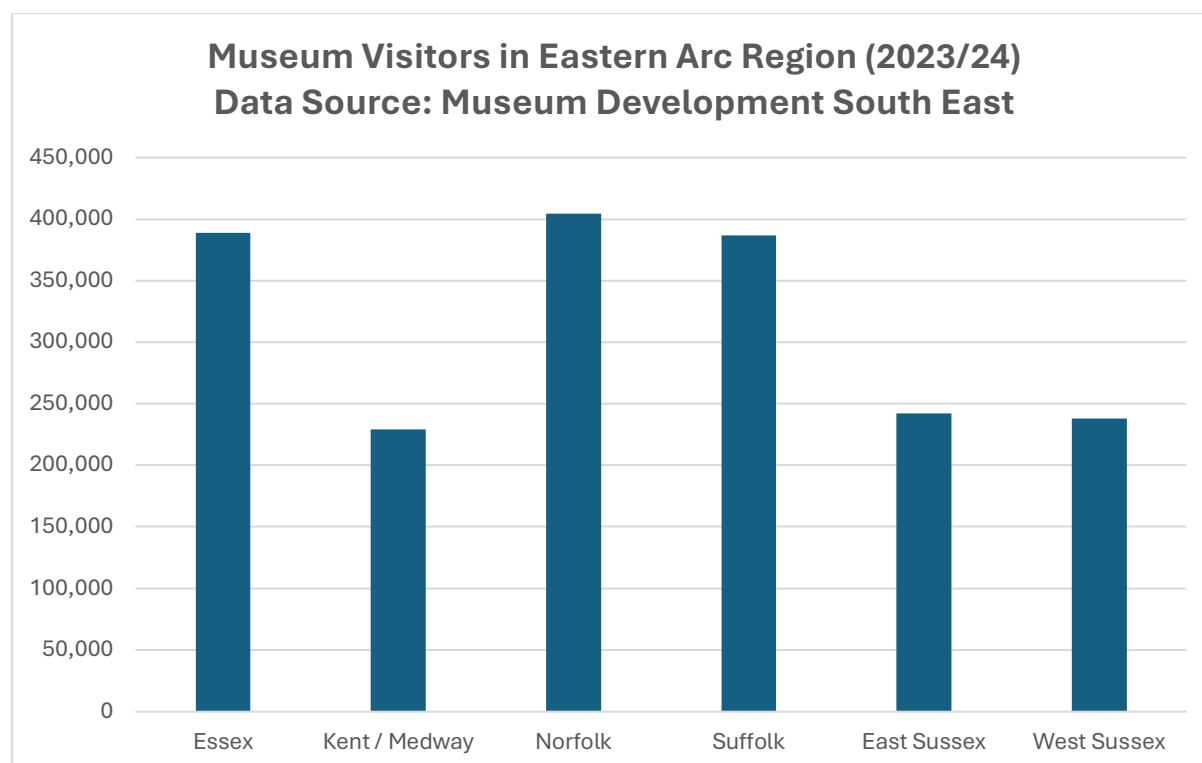


Figure 22. Museum Visitors in Eastern Arc Region (2023/24). Data source: Museum Development South East.

The visitor numbers are currently being under-reported due to the low response rate to the museum survey.

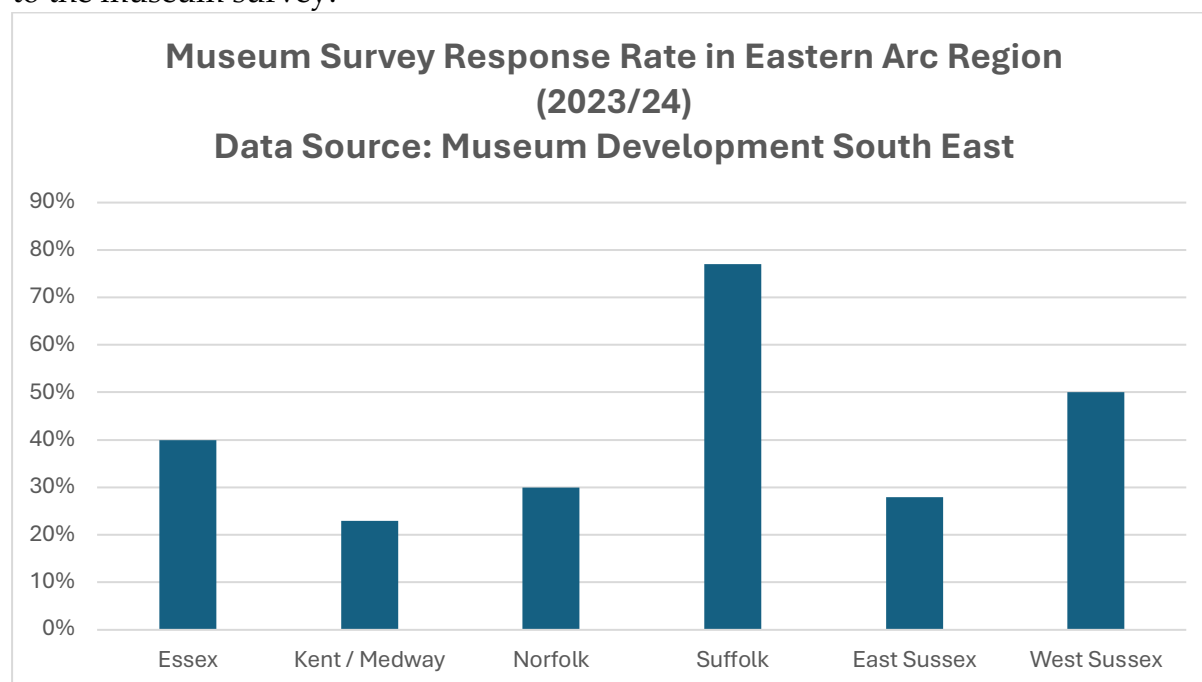


Figure 23. Museum Survey Response Rate in Eastern Arc Region (2023/24). Data source: Museum Development South East.

Some individual museums within the Eastern Arc region are seeing large numbers of visitors, though these data are reported for the financial rather than the calendar year. For example, Turner Contemporary in Margate received over 322,000 visitors in 2023/24, more than the 229,000 visitors reported for 10 of the 44 museums in Kent / Medway by Museum Development South East.

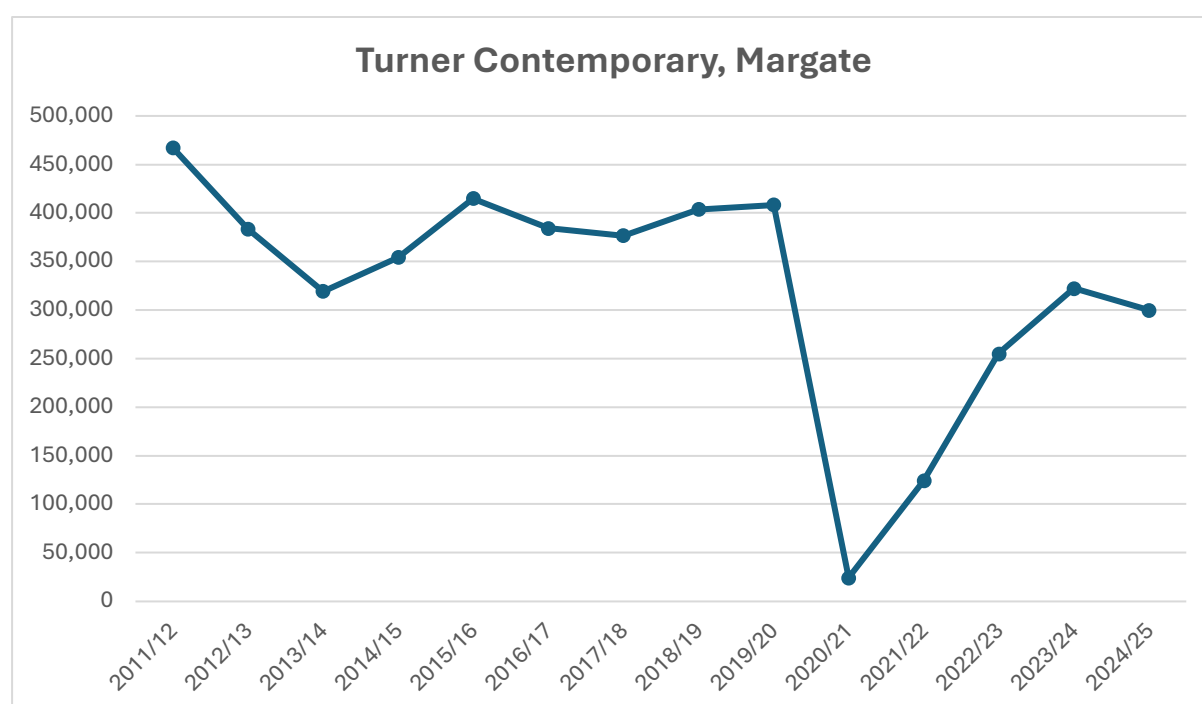


Figure 24. Visitor numbers to Turner Contemporary, Margate by financial year.

English Heritage

The most popular English Heritage site in England is Stonehenge with 1.3 million visitors in 2024. Three properties in the Eastern Arc region feature in the top 10 list: 1066 Battle of Hastings (121,947 in 2024), Audley End (147,701), and Dover Castle (267,320). Visitor numbers have not yet recovered to 2019 levels: this situation is reflected in the regional data.

It will be interesting to see how English Heritage's partnership with Channel 4's Taskmaster will have had an impact on family visitor numbers.¹⁷ Several locations in the Eastern Arc region were taking part: Audley End, Battle Abbey, Dover Castle, Framlingham Castle, and Walmer Castle.

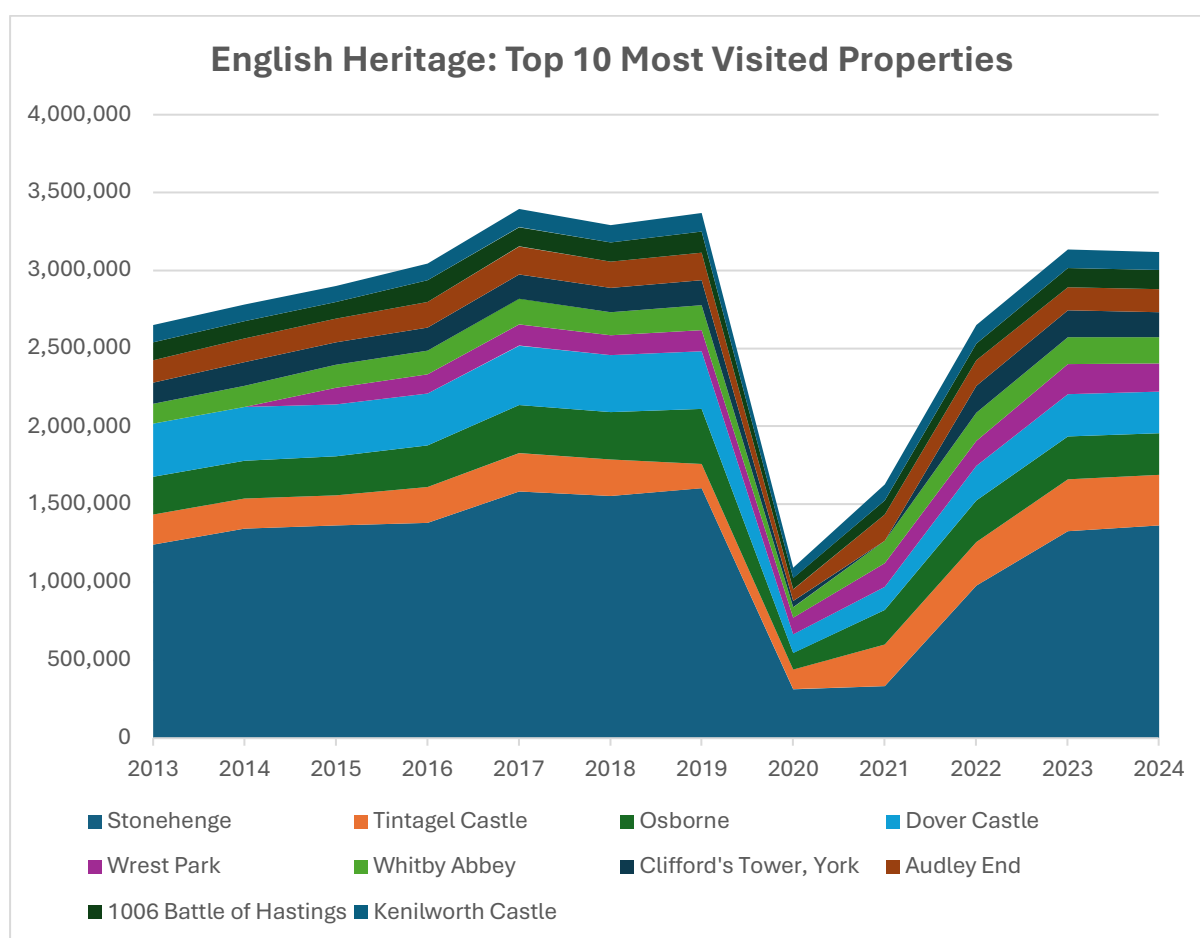


Figure 25. Top 10 most visited English Heritage properties in 2024.

The Eastern Arc region includes a mix of heritage sites from the Neolithic Flint Mines of Grimes Graves in Norfolk to the World War 2 installations at Dover and Landguard Fort. The properties include Battle Abbey and the site of the Battle of Hastings (1066), as well as a series of Roman fortresses that formed part of the Saxon Shore (Burgh Castle, Richborough, Pevensey Castle).

¹⁷ <https://www.english-heritage.org.uk/learn/school-visits/taskmaster-at-english-heritage/>

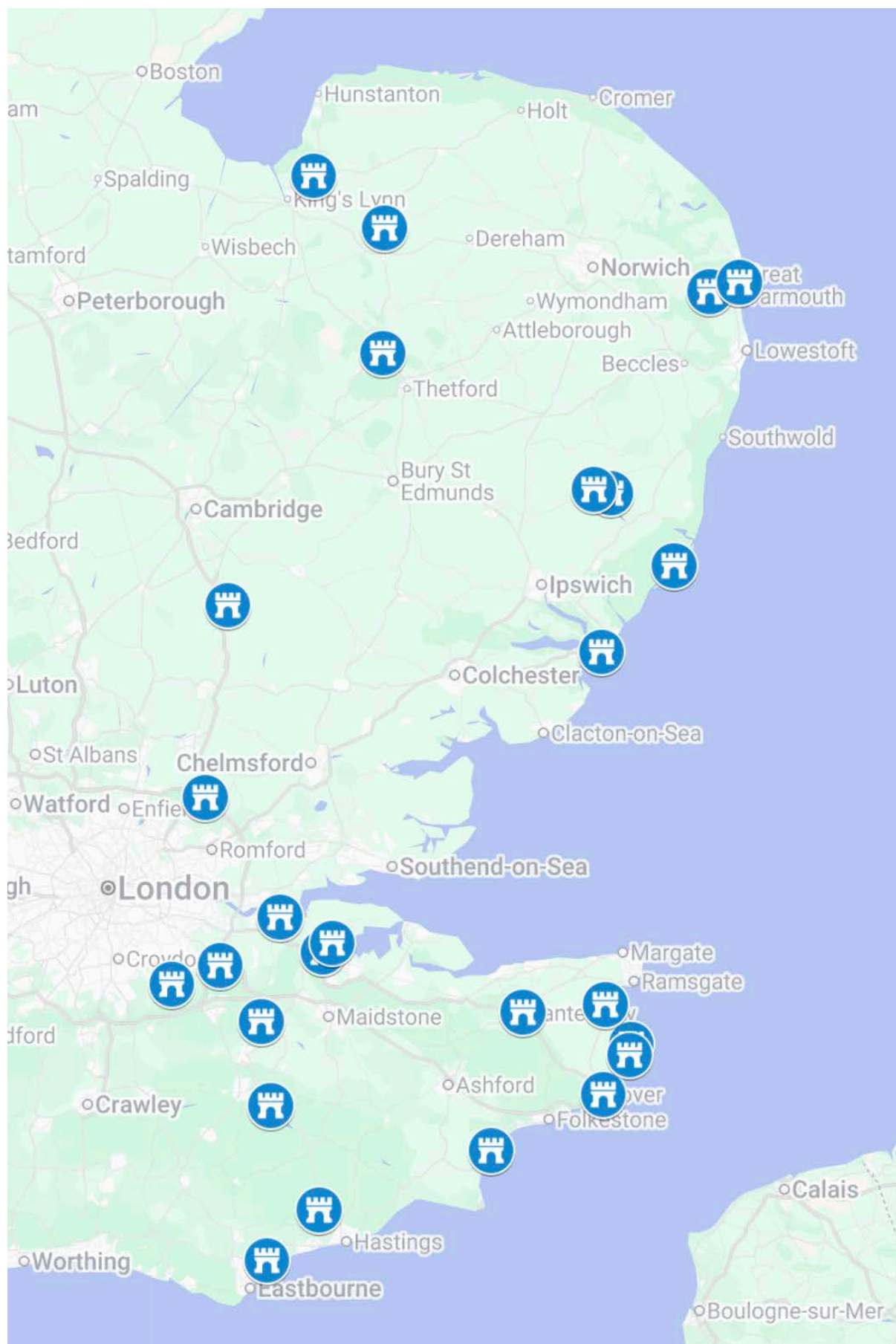


Figure 26. Map showing pay to enter English Heritage properties across the Eastern Arc region.

Kent

There is a noticeable drop in visitor numbers for most properties in Kent. The exceptions are Down House¹⁸ and St Augustine's Abbey. Lullingstone Roman Villa is closed on a temporary basis and therefore there was no return for 2024.

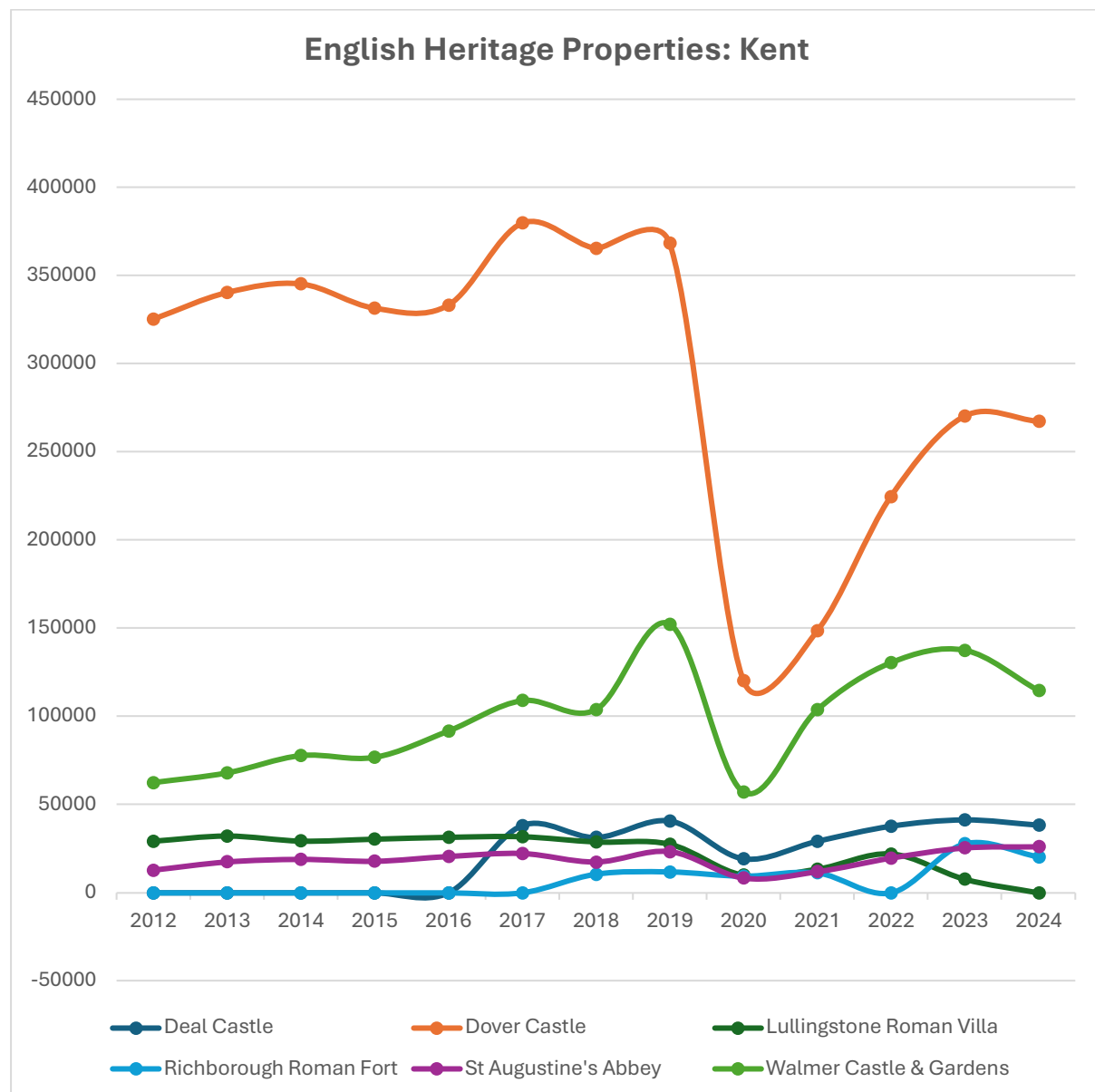


Figure 27. Visitor numbers for English Heritage properties in Kent.

¹⁸ Down House is in the London borough of Orpington.

Essex, Norfolk, Suffolk and Sussex

There are limited data for English Heritage properties in the region:

Essex: Audley End; Tilbury Fort

Norfolk: Castle Acre Priory; Grimes Graves; Great Yarmouth Rows

Suffolk: Framlingham Castle; Orford Castle; Saxted Green Post Mill

Sussex: Pevensey Castle

Grimes Graves was closed to the public in 2022 and 2023.

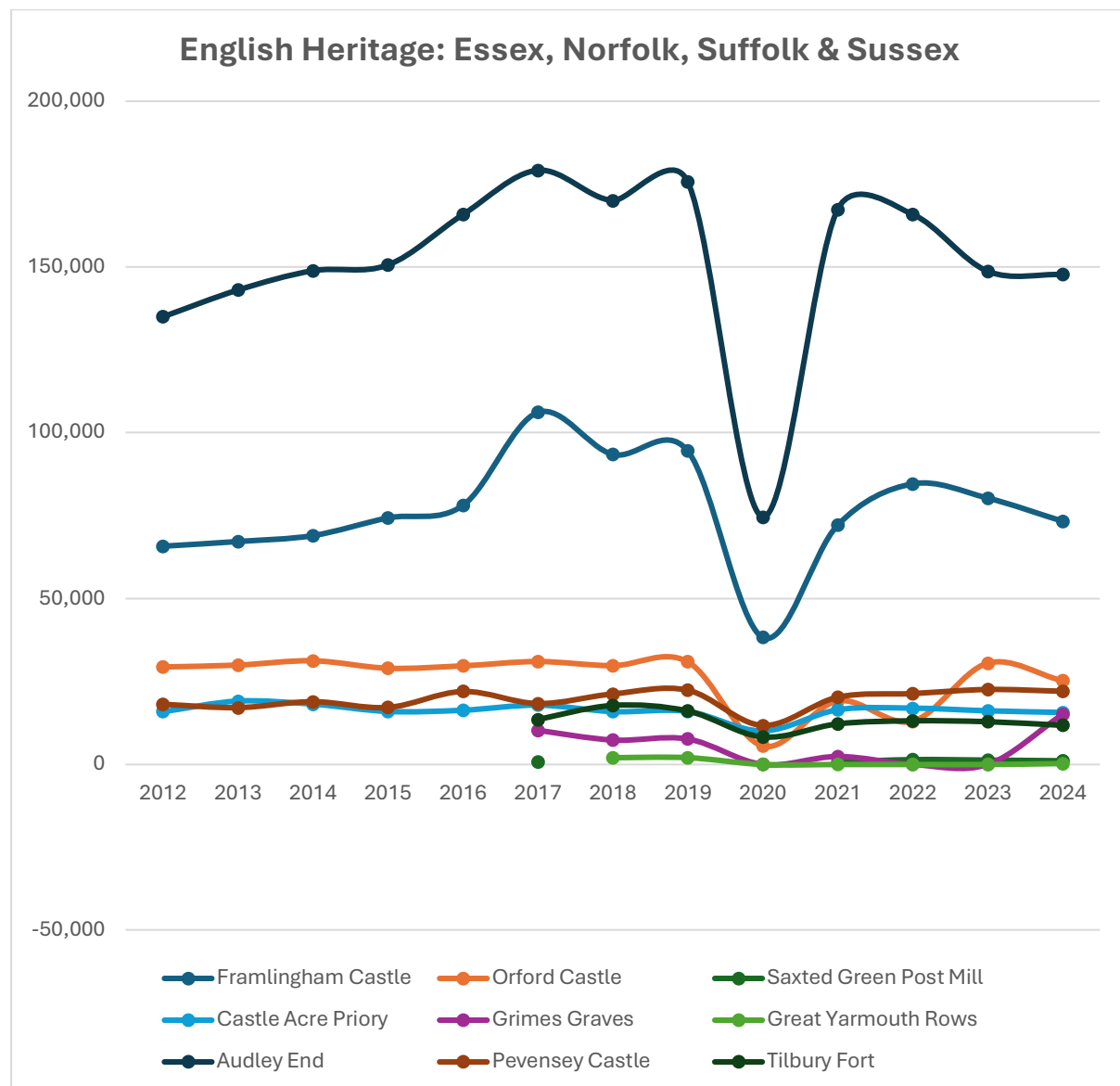


Figure 28. Visitor numbers for English Heritage properties in Essex, Norfolk, Suffolk and Sussex.



Figure 29. Map showing the distribution of the Top 10 most visited English Heritage properties in 2024.

National Trust

National Trust properties in the Eastern Arc region range from the Anglo-Saxon ship-burial site at Sutton Hoo to Chartwell, the home of Sir Winston Churchill. The Cold War facility of Orford Ness on the Suffolk coast incorporates important natural habitats. Major houses include Blickling, Ickworth, Knole, and Petworth.

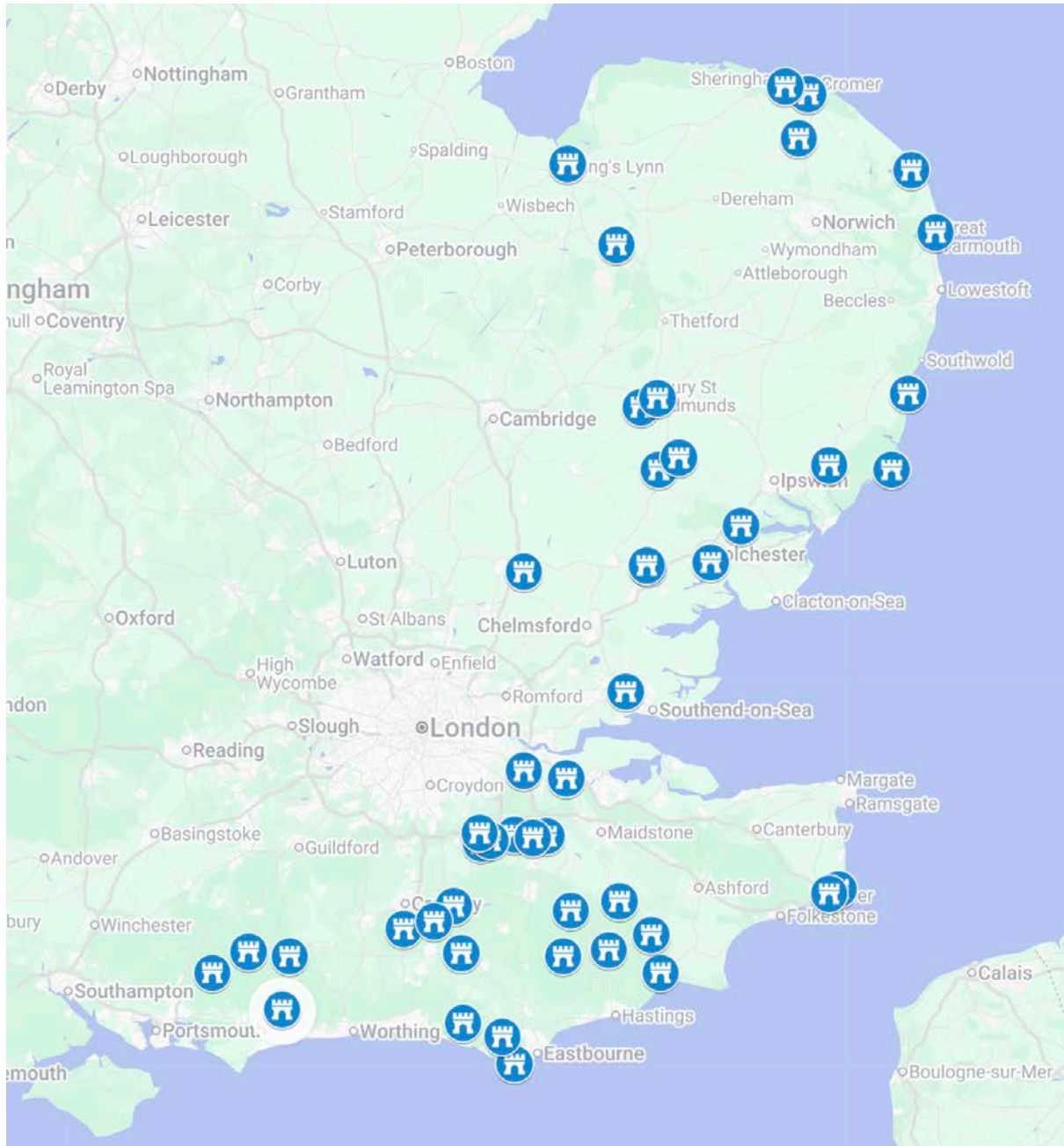


Figure 30. National Trust properties (excluding countryside) in the Eastern Arc region.

Essex

Most National Trust properties in Essex are free to visit, and visitor numbers are not published. Bourne Mill only has returns for 2023 and 2024, both with less than 2,000 visitors. Hatfield Forest was included for 2022 and 2023, both with over 320,000 visitors.

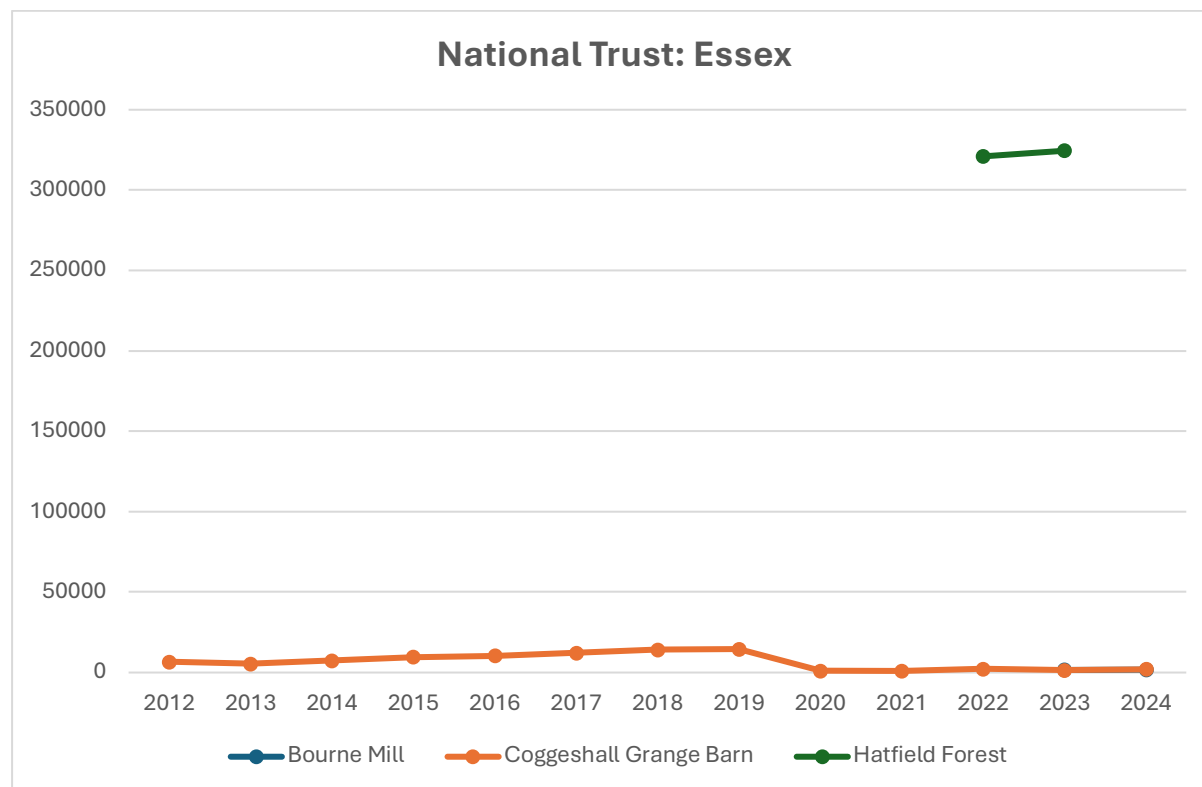


Figure 31. Visitor numbers for National Trust properties in Essex.

Kent

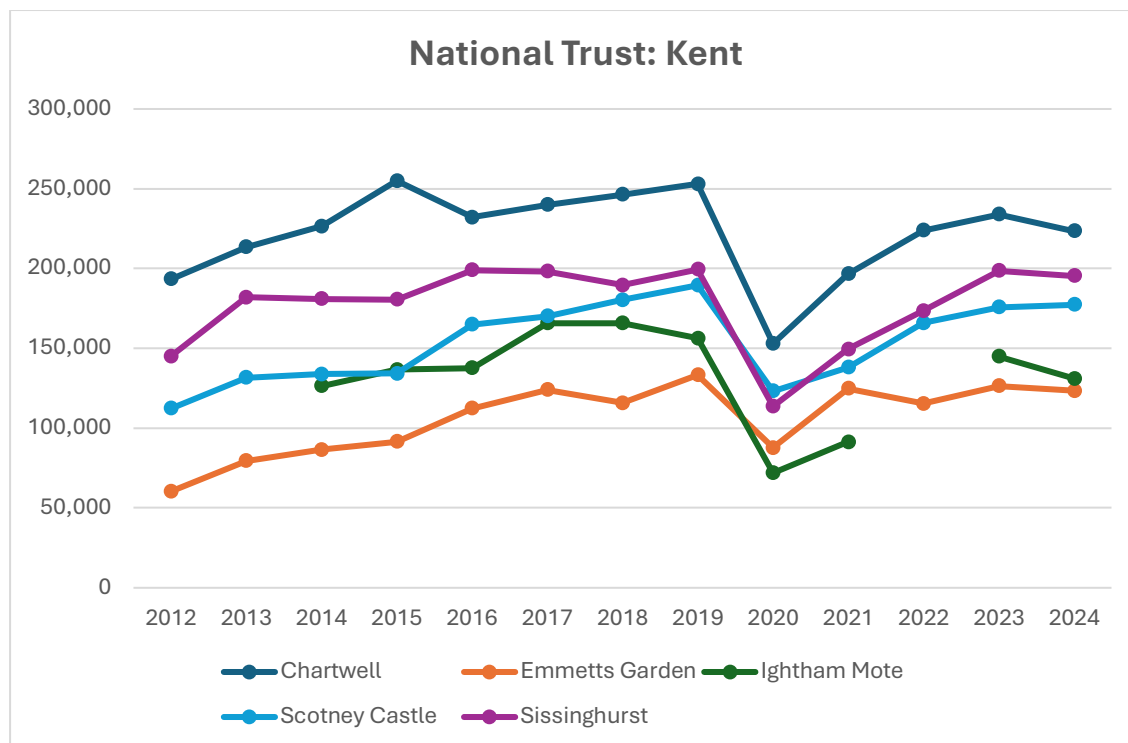


Figure 32. Visitor numbers for National Trust properties in Kent.

Norfolk

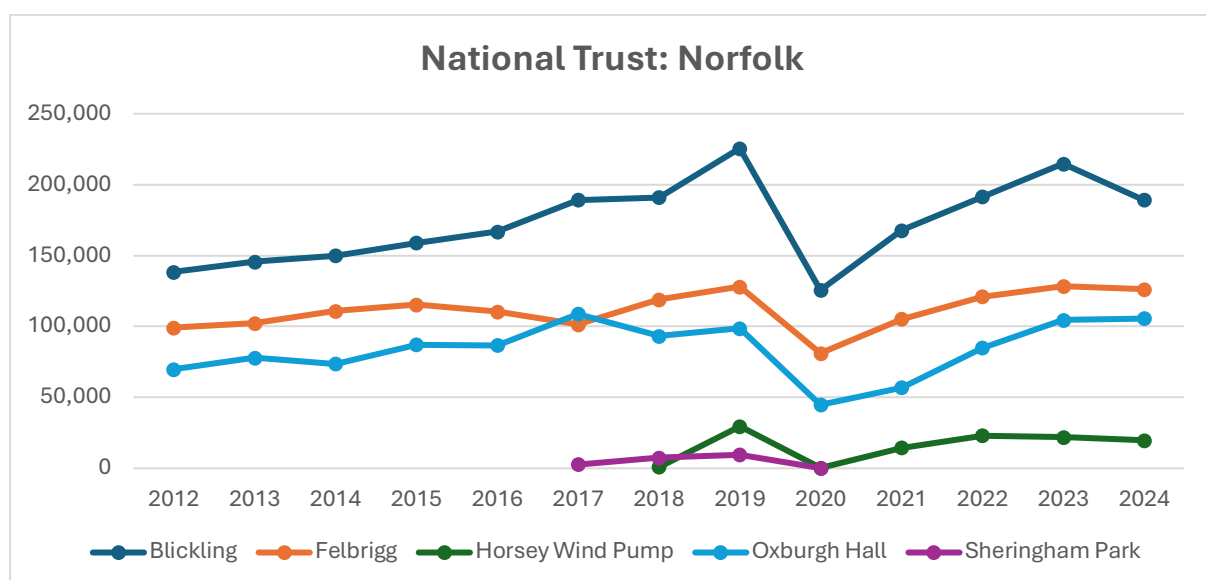


Figure 33. Visitor numbers for National Trust properties in Norfolk.

Suffolk

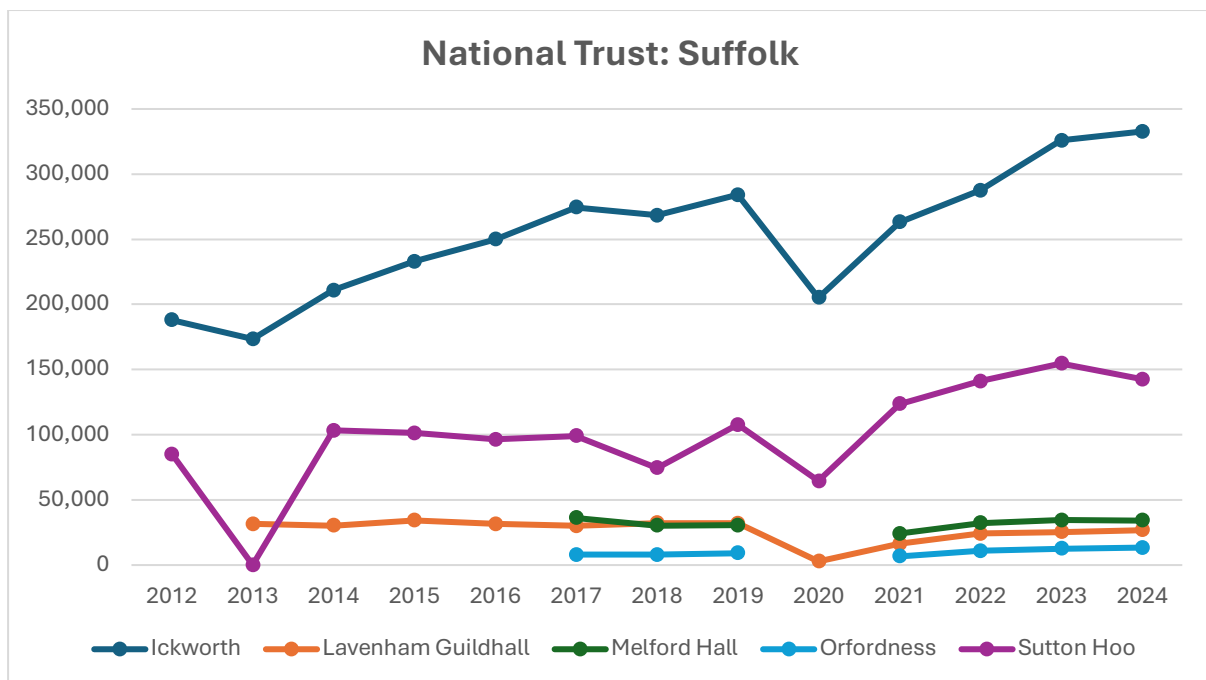


Figure 34. Visitor numbers for National Trust properties in Suffolk.

Sussex

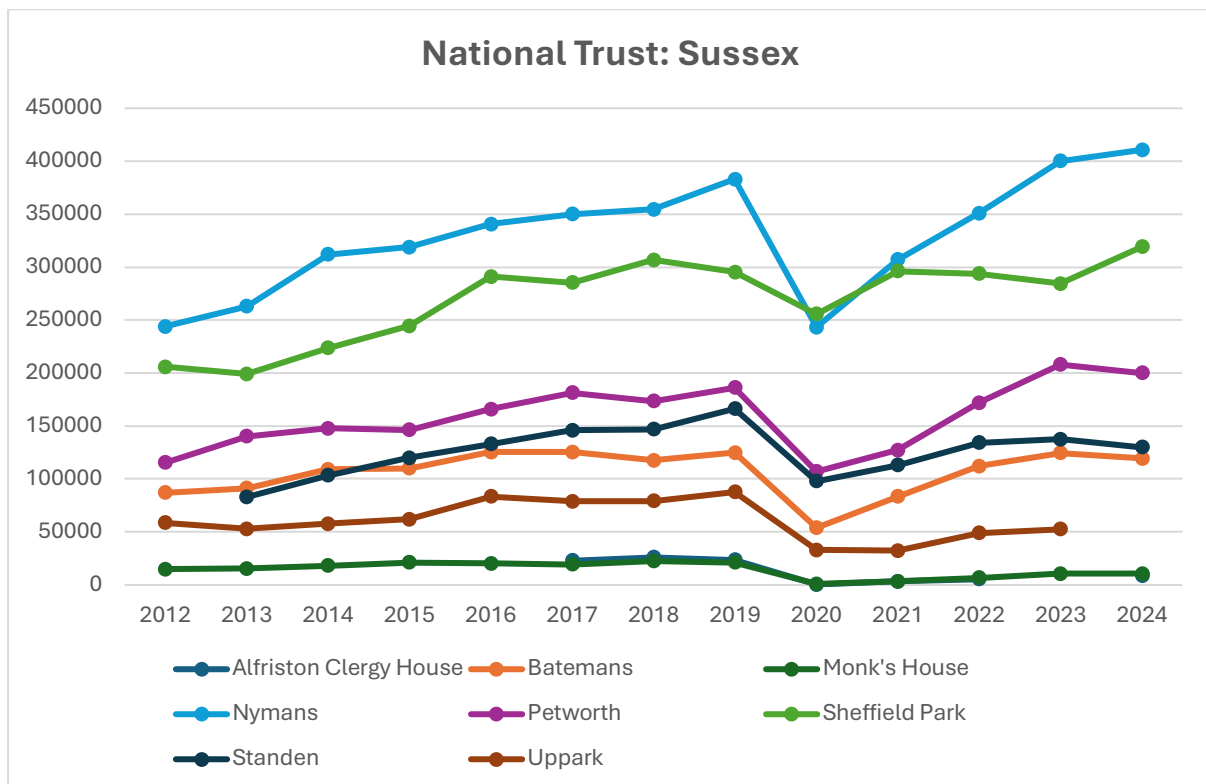


Figure 35. Visitor numbers for National Trust properties in Sussex.

Top 30 Most Visited National Trust Properties

Several NT properties from the Eastern Arc region fall into the top 30 sites for the National Trust: Nymans Garden; Ickworth; Sheffield Park; Knole. Together these properties attract over 11 million visits.

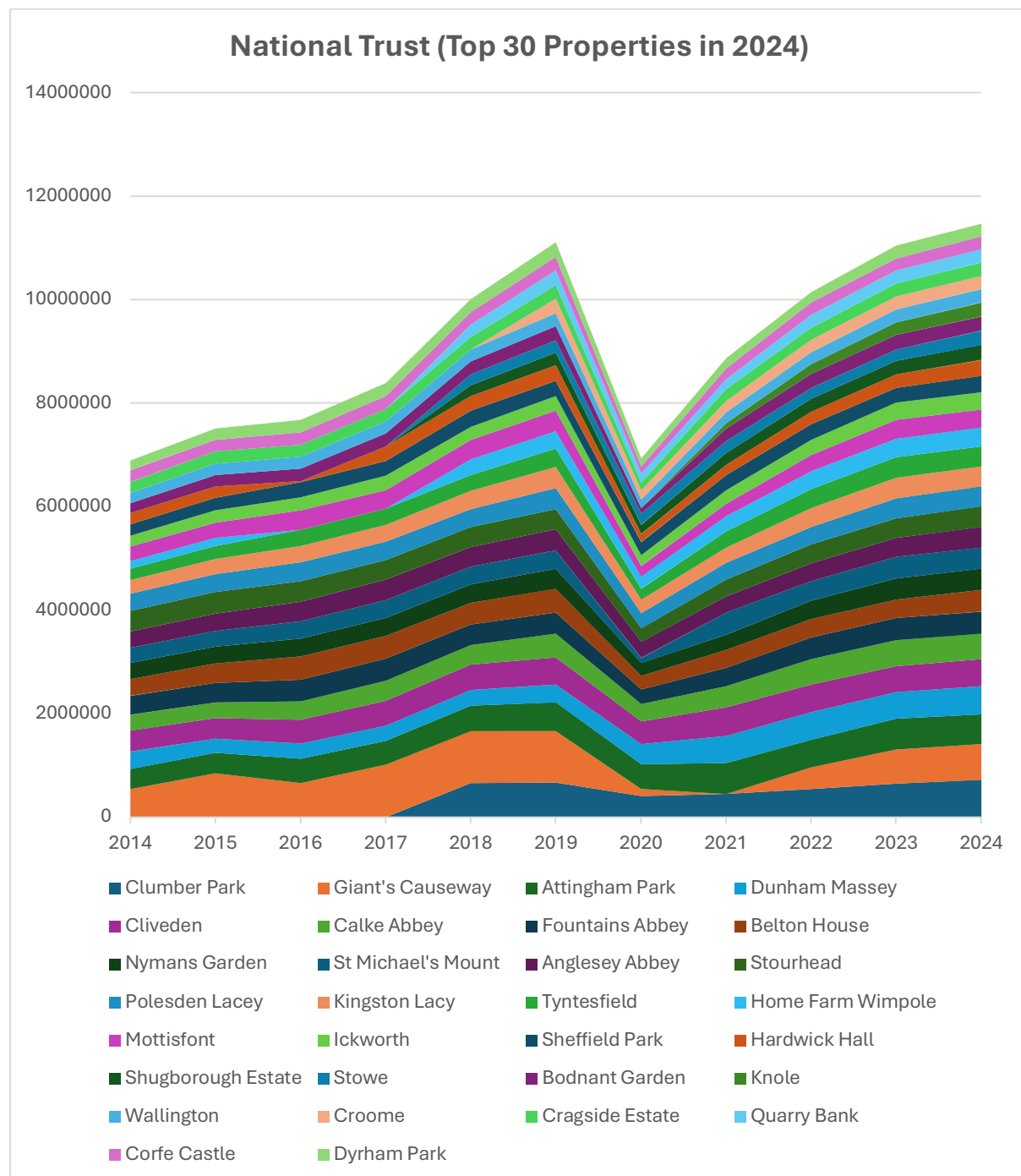


Figure 36. Visitor numbers for Top 30 most visited National Trust properties in 2024.

Historic Houses Association

Data for properties that form part of the Historic Houses Association are included in some cases within the return supplied by Visit Britain. Properties include Sandringham, Holkham Hall (Treasure Houses of England), and Hever Castle.

There are inconsistencies in the data. The peak for Sussex in 2019 is due to Arundel Castle Gardens. The drop in numbers for Norfolk between 2016 and 2018 is due to missing data for Holkham.

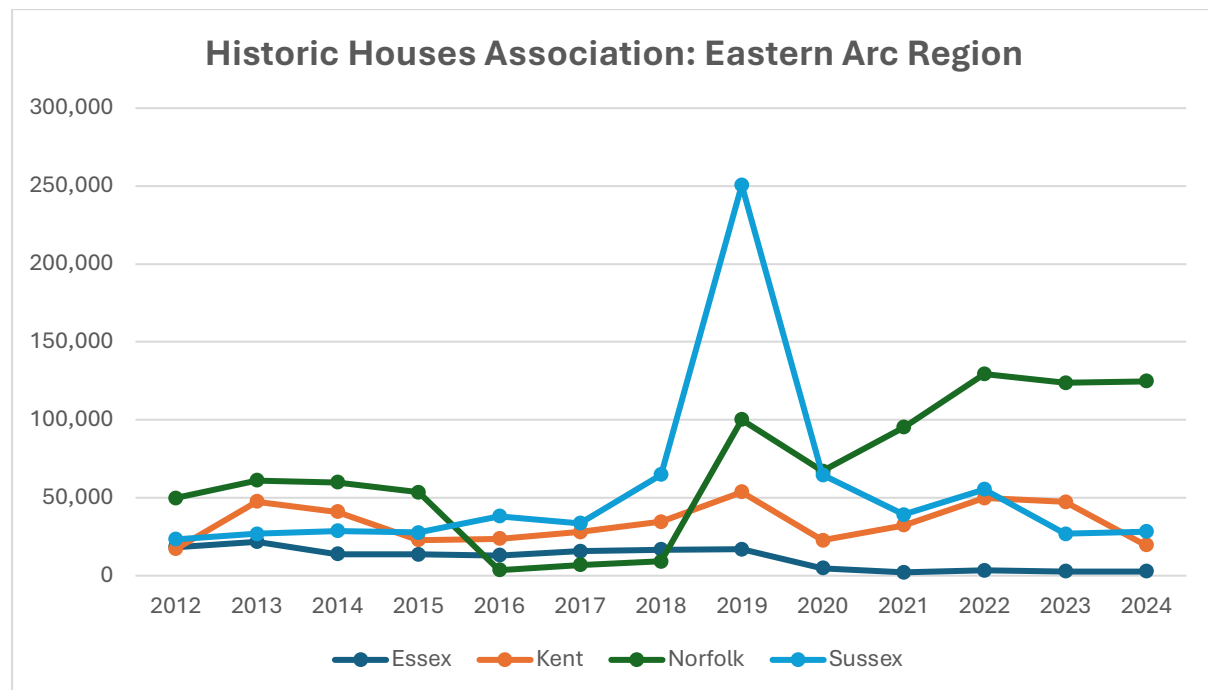


Figure 38. Visitor numbers for Historic Houses Association in Eastern Arc Region (Visit Britain data).



Figure 39. Historic Houses Association in Eastern Arc region.

The Eastern Arc Region in a National Context

This sample of top 10 most visited properties in 2024 for four heritage bodies, plus the Historic Royal Properties and Treasure Houses of England, represent just under 23 million visits.¹⁹ Visitor numbers for English Heritage, Historic Environment Scotland and Historic Royal Palaces have not yet returned to pre-COVID levels. This trend appears to be mirrored across the Eastern Arc region.

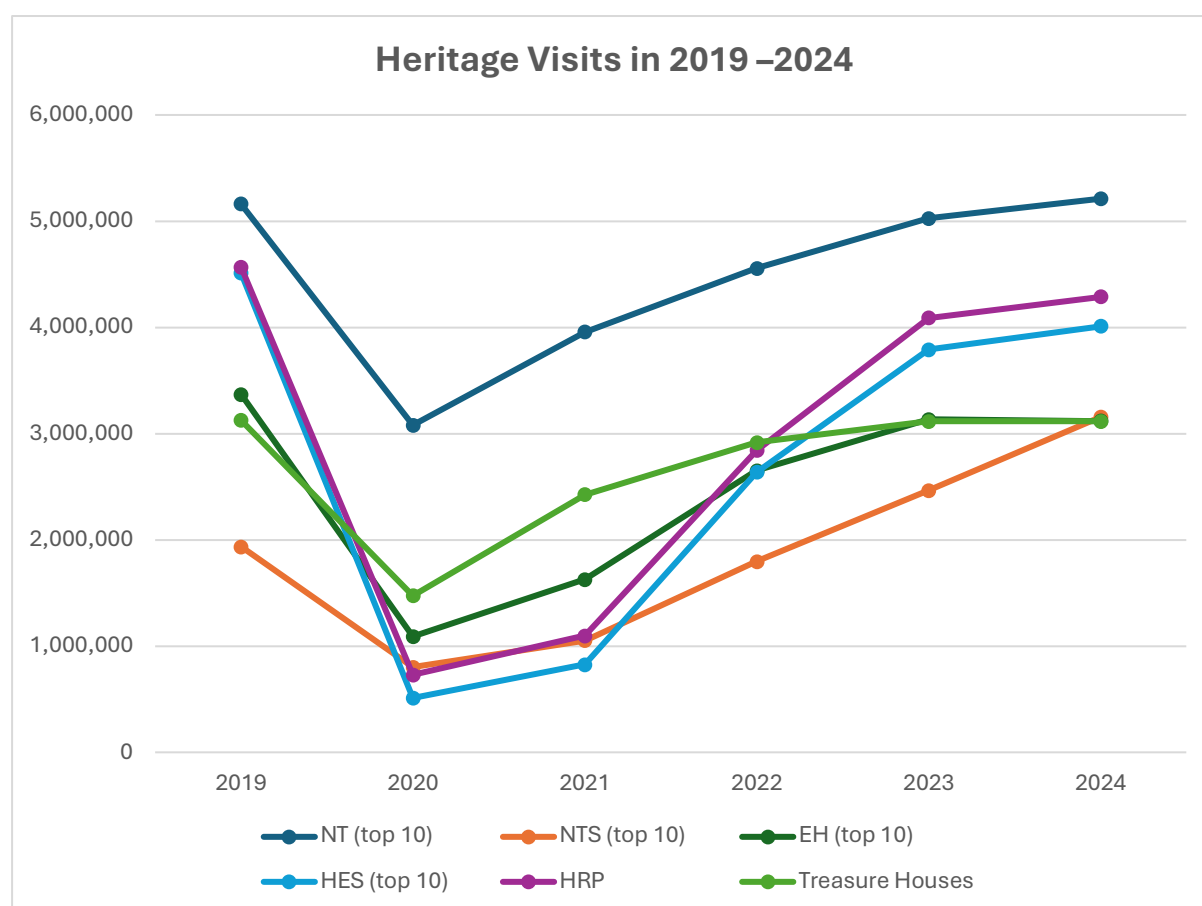


Figure 40. Visitor numbers for major heritage bodies in the United Kingdom.

¹⁹ The data for the Top 10 properties in 2024 are used for the figures from 2019 to 2023.

Conclusion

The Eastern Arc region is home to a rich range of heritage from Neolithic mines to Cold War facilities. Coastal heritage is a key element that includes Late Roman fortresses, medieval castles guarding gateways into England, Tudor Artillery Forts, Napoleonic Martello Towers, and World War Two installations. The region includes a range of major country houses often set in historic landscapes. There is one UNESCO World Heritage site, as well as one UNESCO City of Literature (Norwich).

This report demonstrates the value of heritage to the national economy (as well as to local economies), and that heritage tourism needs to be taken seriously in discussions relating to devolution and the development of local growth plans. However, we would suggest that the actual value of heritage is even higher, and we would encourage the development of a consistent system for the collection of data relating to museum visits in order to provide a comprehensive and complete picture.

Recommendations

The report recommends the following:

- To improve the robustness of data relating to the heritage economy, including:
 - The development of a consistent methodological framework for its collection and presentation;
 - A new system to identify and collect museum and archive visitor data;
 - The inclusion of natural heritage within remit (using data from organisations such as the Wildlife Trusts and the RSPB).
- To increase the profile and awareness of the heritage economy among stakeholders, politicians and the public through:
 - The development of an integrated digital heritage strategy for heritage sites, museums and archives for the region.
 - Based on this, regular updated reports to the Eastern Arc Heritage and Culture Network and associated organisations in order to identify changes in regional trends.
- To facilitate coworking and engagement between heritage organisations and other stakeholders, leading to an improved focus on investment in the heritage sector. Stakeholders should include but not be limited to:
 - Local government;
 - The Higher Education (HE) sector;
 - Grassroot and small community organisations;
 - Creative industries;
 - Heritage professionals;
 - Grassroot and small heritage organisations in the region.

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We are grateful to Jamie Everett and Charlotte McGreavy of Museum Development South East for their sharing of museum data from across the Eastern Arc region, to Toby Parkin for visitor figures from Turner Contemporary in Margate, to Jayne Knight for help with the Norfolk and Suffolk Culture Board, and to Maria-Helena Santamaria for assistance with the data covering East Sussex. Paul Allain, Sarah Barrow, Christopher Moore and Robert Sharp made helpful suggestions on earlier drafts. Other members of the Eastern Arc Heritage and Culture Network made constructive comments on an earlier presentation of some of the data.

The data source for museums across the region is derived from Museum Development South West's Annual Museum Survey 2024.

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