East of England Implementation Plan

Culture, Creativity and the Visitor Economy: Theme Advice

April 2009

east of england
space for ideas

Contents

1: Overview and summary

1.1 Culture and creativity has a strong contribution to make to regional competitiveness. The contribution of culture extends from building networks and communities to creating international profile for our region and a strong tourism offer, enhancing the quality of built environment and historic assets, to attracting inward investment, fostering innovation and entrepreneurship.

1.2 Tourism and the visitor economy support critical parts of what constitutes 'quality of life'. For example, tourism, whilst providing an 'offer' for visitors, will also provide increased choices for local residents and businesses and through the formation of a critical mass; which for example, in practical terms develops a greater scale or choice of cultural venues and leisure facilities, as well as enhanced transport links, which may otherwise not be viable with only a local population to support it.

1.3 The region has a rich cultural heritage and has been developing a network of centres of excellence and talented businesses and organisations which are making the region one of the best places in Europe to live, work and visit. However, there is no room for complacency in an increasingly competitive and financially constrained global context.

1.4 New national policy, Creative Britain: New Talents for the New Economy (2008) and Innovation nation (2008); states that creativity and innovation should be at the heart of regional development. Key strands of Creative Britain include: turning talent into jobs, supporting creative clusters and supporting research and innovation. Supporting business innovation, innovative people and innovative places are key strands of Innovation Nation.

1.5 This theme contributes to a number of the RES and RSS high level targets including GVA (Gross Value Added) targets, including through its above average growth and growth per employee. It also demonstrates how the theme can generate and sustain the skills needed for businesses and organisations within the sector, and the skills linked to creativity which are of wider benefit across a wide-range of industry sectors. It also demonstrates the contribution made to employment growth and business start ups, particularly in relation to tourism; and the growth in the cultural and creative industries, especially in relation to digital and media.

1.6 The region receives a comparatively low level of public sector investment. However it has demonstrated its ability to form innovative partnerships that have exploited joint investment, catalysed regeneration, stimulated inward investment and attracted cultural and creative businesses. However the historic underinvestment and declining level of public sector resources in a difficult financial climate mean that there is a significant risk that the region will not be in a position to capitalise on potential opportunities to improve the economy of the East of England.

1.7 The programmes that need to be addressed most urgently are:

- Developing innovation and entrepreneurship in creative and cultural industrioes to drive up the level of productivity and added value in the region's economy

- Developing opportunities to increase economic inclusion, skills and productivity throughout the supply chain for cultural and creative industries, sports, leisure and the visitor economies
- Maximising the long term economic , cultural and sporting benefits from London 2012
- Promoting the region as a place to visit and invest
- Supporting the growth of sustainable communities, through the development of major strategic and cultural facilities in a region faced with significant growth

2: The contribution of the Theme to the two strategies

Scope of the Theme

2.1 For the purposes of the East of England Implementation Plan, the scope of this Theme is set out in Table 2-1 below.

Table 2-1 : Culture, creativity and the Visitor Economy

What the Theme includes	What the Theme excludes
Cultural industries	
Tourism-related activity	
Interventions linked to creativity	
Cultural aspects of "place-shaping"	
Public sector driven initiatives and those driven by the private sector where known to be significant	Full analysis of private sector driven culture, creativity and tourism initiatives

2.2 Following the 2008 DCMS national review of regional cultural agencies the context for regional cultural policy changed. The Regional Cultural Consortium ceased to exist and cultural agencies were tasked with a range of activity including developing future regional strategies, working with local government, and place shaping, with a strong emphasis on building a shared evidence base. The drafting of this Theme advice was undertaken by a Regional Strategies Group comprising the four regional agencies tasked with this activity and which provide support for sport, museums and archives, arts and creative media and heritage; Arts Council East, Sport England, English Heritage and Museums Libraraies and Archives (MLA), with wider membership from Screen EAST, Go-East and EEDA. Elements of the Theme advice relating to the visitor economy were drafted by EEDA in consultation with East of England Tourism (EET).

2.3 The agencies have articulated the case and ambitions for public sector funded culture, creativity and tourism funded initiatives, some of which also have private sector funding. Where significant private sector initiatives are known they are also highlighted. The agencies hope that the programmes within this theme inspire confidence and can form the basis for further dialogue about co-investment.

Relationship to high level regional outcome targets from RES/RSS

2.4 The two regional strategies include a number of high level regional outcome targets which, essentially, are quantified expressions of the two strategies' visions.   The principal high level outcome indicators are shown in Table 2-2 below, and – in broad terms – the relationship between them, and the Culture, Creativity and Visitor Economy Theme, is flagged.

Table 2-2: Summary - relationship between interventions linked to the **Culture, Creativity and Visitor Economy Theme** and the likely impacts on high level regional targets

Headline Indicator	Target	Direct effects	Indirect effects
GVA per capita / per worker	Annual growth in real workplace-based GVA per capita of 2.3 per cent and GVA per worker of 2.1 per cent between 2008 and 2031	↑	
Employment rate	Employment rate for the working population of 80 per cent and for the 16-74 population of 70 per cent by 2031	↑	
Earnings inequality	A rise in lower-quartile earnings to 60 per cent of average earnings by 2031		
Water consumption	Per capita consumption of water by households in 2030 that is 20 per cent below 2008 levels, or 120 litres/head/day		
CO_2 emissions	End-user CO_2 emissions in 2031 that are 60 per cent below 1990 levels		↔
Skills – Leitch targets	Over 40 per cent of adults qualified to at least level 4, 68 per cent of adults qualified to at least level 3 and over 90 per cent of adults qualified to at least level 2 by 2020 and maintained to 2031	↑	
Net additional dwellings	508,000 (2001-21)		
Jobs growth	452,000 (2001-21)	↑	
Affordable Housing	35% of new houses with planning permission granted after May 2008 are affordable		

Key: ↑ impacts ought to be positive in relation to the headline indicator; ↓ impacts likely to be negative in relation to the outcome indicator; ↔ impacts could be either positive or negative

2.5 With regard to the East of England Implementation Plan, however, two critical questions need to be addressed:

- first, what is the scale of the gap between trajectory (which assumes business as usual with regard to on-going interventions) and target?
- second, what, in principle, is the role of interventions linked to this Theme in terms of improving identified outcomes and closing the gap?

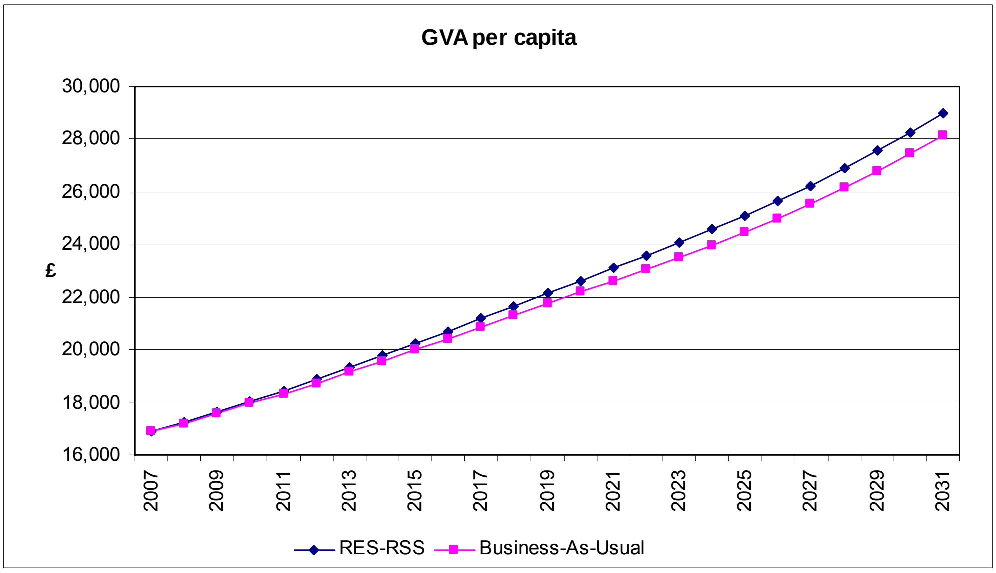
2.6 In relation to the headline outcomes of relevance to this Theme, we consider these questions in the paragraphs that follow.

GVA per capita

Scale of the challenge the region has set itself

2.7 Figure 2-1 shows the gap between targets and trajectories in relation to per capita GVA. By 2031, the difference is approaching £1000 per capita per annum. Put another way, the trajectory is about 96% of the target. This suggests that the “gap” is not enormous, but it is significant.

Figure 2-1: Targets and trajectories: GVA per capita



Source: EEDA

Potential contribution to be made by the Theme

2.8 Nationally, the argument has been made that the creative and cultural industries are the UK's fastest growing sector. Specifically:

> *The total creative footprint (covering all the UK's creative industries, not just the Creative & Cultural Skills sectors) covers 7.3% of the economy and is growing at 5% per year. Within the Creative & Cultural Skills footprint, a total of 542,470 people work across 62,145 businesses in advertising, cultural heritage, design, music and the arts. The GVA (Gross Value Added) output per employee in 2006 was £34,940 per employee, compared to a GB average of £33,374*[1].

2.9 Hence the creative and cultural industries make a direct contribution in terms of per capita GVA targets because they perform better than the economy as a whole in terms of GVA per job.

2.10 More indirectly, the **Culture, Creativity and Visitor Economy Theme** also contributes to GVA per capita outcomes in at least four different ways:

- First, the **Culture, Creativity and Visitor Economy Theme** supports critical parts of what constitutes 'quality of life', and there is evidence that quality of life considerations affect business investment decisions. For example, tourism, whilst providing an 'offer' for visitors, will also provide increased choices for local residents and businesses

- Second, marketing of the region linked to the **Culture, Creativity and Visitor Economy Theme** has significant spillover benefits and will naturally support inward investment marketing messages. 'Place Positioning' will support inward investment

[1] Economic Profile of the Creative and Cultural Industries – Creative Choices Available at http://www.creative-choices.co.uk/upload/pdf/economic_profile.pdf

directly – but tourism marketing campaigns will also indirectly promote the region to businesses prepared to invest and "do business" in the region

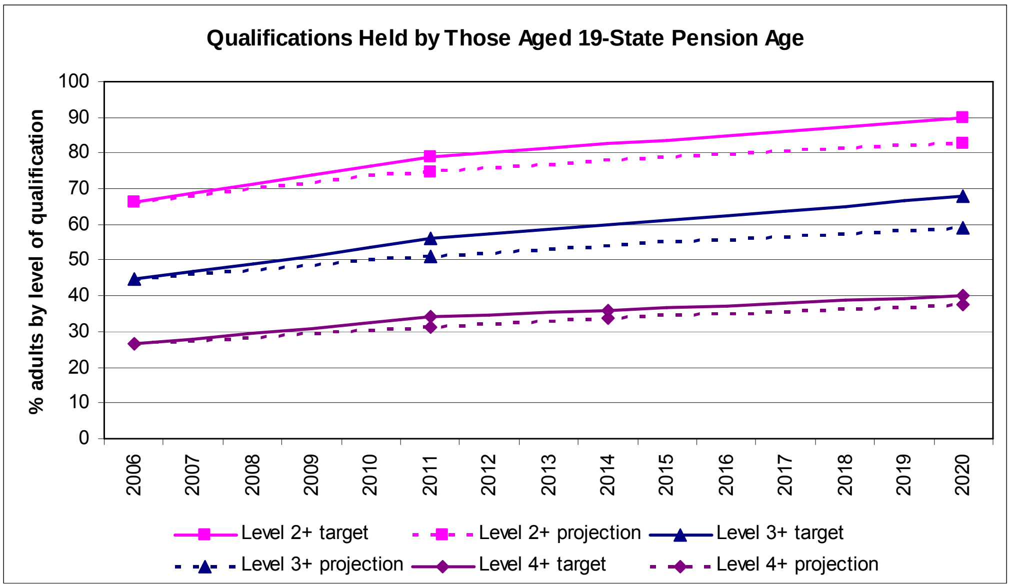
- Third, the skills associated with creativity, are amongst the most important in securing improvements in the productivity of the economy overall.
- Fourthly, public libraries are significant providers of information, advice and guidance to SMEs and sole traders at the earliest stages of business development.

Skills

Scale of the challenge the region has set itself

2.11 Projections relating to the region's performance in terms of **Leitch metrics (skills)** – alongside the targets to which the region has committed – are shown in the graphic below. Overall, these data suggest that – relative to its aspirations – the region is falling behind. Moreover the shortfall in terms of projected regional performance is apparent at all three levels. Hence the imperative must be to increase the proportion of people achieving attainment targets at level 2, and then to encourage progression to higher levels. Much of this increment will need to be achieved amongst adults who have left compulsory education and are already in the workforce (given timescales and demographics) and this suggests particular imperatives in relation to workforce development and work-based learning.

Figure 2-2: Projections and Targets in relation to Skills



Potential contribution to be made by the Theme

2.12 Interventions linked to the **Culture, Creativity and Visitor Economy Theme** have an important role to play with regard to skills outcomes in the region. This role needs to be defined at two levels:

- generating the skills needed for businesses and organisations within the sector

- generating skills, both generic and linked to creativity which are of wider benefit across a range of industry sectors.

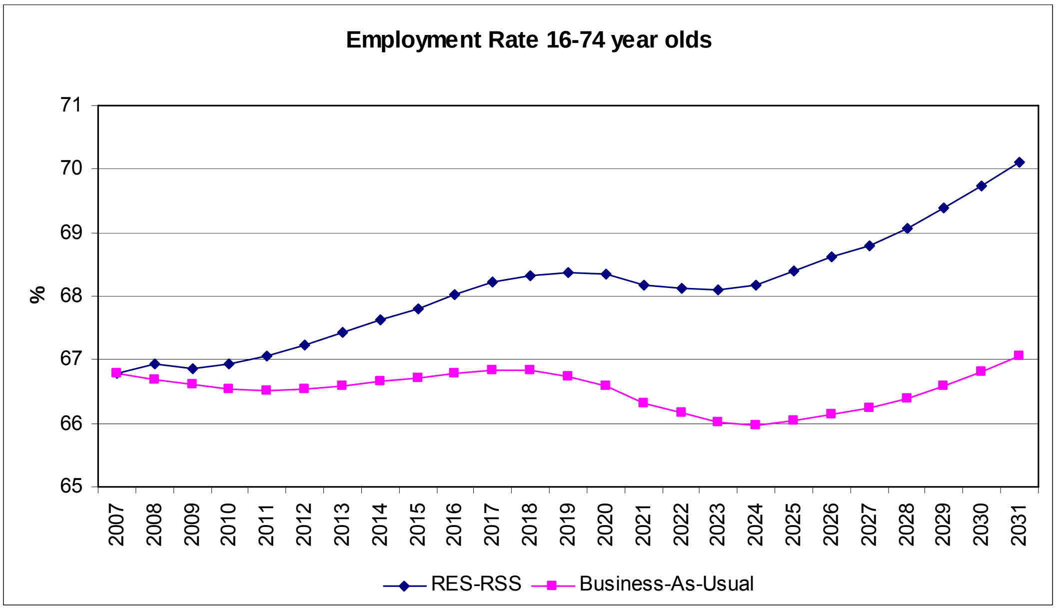
2.13 Potentially, both of these processes can lead to better skills outcomes within the East of England.

2.14 In terms of the first, the Sector Skills Councils – Creative and Cultural Skills, People 1st, Skillset and Lifelong Learning UK are addressing key issues including qualification reform to ensure that our education system provides qualifications relevant to industry and that there are effective progression routes into and within the sector.

Scale of the challenge the region has set itself

2.15 With regard to the **employment rate**, Business as Usual projections suggest a picture which – although subject to year-on-year fluctuation – is reasonably static over the period to 2031, at 66-67%. The target, however, is to achieve an employment rate of over 70% by the end of the period. The implication is that addressing worklessness must remain a priority, recognising that this needs to take place in the context of a population which is both growing and ageing (and note that the target is couched in terms of employment rates up to the age of 74).

Figure 2-3: Projections and Targets in relation to Employment Rates



Potential contribution to be made by the Theme

2.16 The **Culture, Creativity and Visitor Economy Theme** potentially has an important role to play in relation to employment rates across the region. Culture is about improving the quality of life of communities and individuals. It improves places, and cultural activities are key drivers of prosperity and social cohesion and not merely the effects of these, and culture has a major part to play in meeting the special challenges faced within regeneration and growth areas.

2.17 The sector as a whole plays an important role in relation to employability. A study completed by Deloittes, for example, found that:

> *There is evidence that tourism related employment provides labour market entry opportunities to those with low or no skills, who can only work part-time and/or those who may not otherwise engage with the labour market, potentially at a cost to the taxpayer. Once in employment, they can be upskilled and move up the value added chain*[2]

2.18 Tourism 'lifestyle' businesses can also keep older people in employment or economically active; they can help maintain some of the region's historic houses and iconic buildings for visitors, local people and future generations to enjoy; help sustain the livelihood of farmers and other businesses who have diversified into tourism and a strong visitor economy will enable the growth of B&Bs, rental cottages, guest houses and other tourism lifestyle businesses.

2.19 In the East of England, issues relating to employability have an important spatial dimension. The coastal economies of the East of England are – in general – amongst the weakest, and they can be most reliant on tourism. This is backed up by research[3], which shows that 17.4% of Great Yarmouth's industry is tourism related. This ranks 17th highest across an analysis of all UK local authorities, but when the rural authorities have been removed from this analysis, it ranks 6th in the UK in terms of its reliance.

Jobs growth

Scale of the challenge the region has set itself

2.20 Figure 2-4 – at a sub-regional level – shows the difference between the target and the underlying trend. It suggests – overall – that the jobs growth target ought to be achievable, but that within this picture, some sub-regions will struggle (notably Suffolk and Essex Thames Gateway). However in reviewing these data, it is important not to forget the context for them: the trend data are driven out of a context of economic buoyancy and prospects for jobs growth in the current environment are less strong. Overall then, there is no room for complacency.

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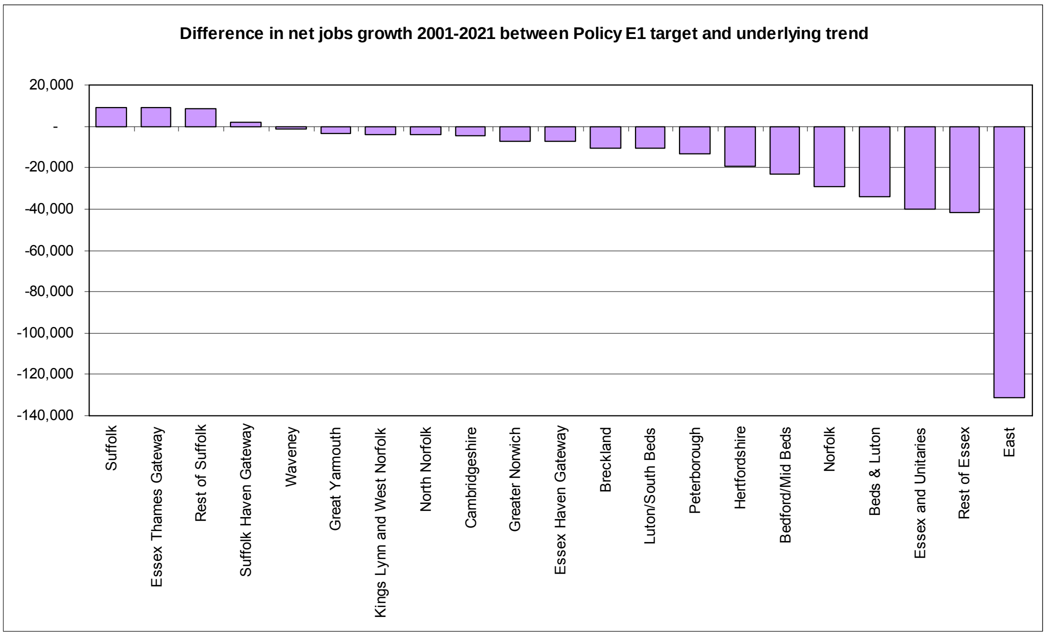
[2] '*The Economic Case for the Visitor Economy*', September 2008, prepared by Deloitte for Visit Britain and the Tourism Alliance, www.visitbritain.com/en/campaigns/tourism-review/reports.aspx

[3] '*The Economic Case for the Visitor Economy*', September 2008, prepared by Deloitte for Visit Britain and the Tourism Alliance, www.visitbritain.com/en/campaigns/tourism-review/reports.aspx

Figure 2-4: Jobs growth – target and trajectory



Potential contribution to be made by the Theme

2.21 The *Economic Case for the Visitor Economy* notes strong entrepreneurial activity in the visitor economy, with one of the highest levels of business creation across all sectors in both absolute and percentage terms. This is because the visitor economy has comparatively low barriers to entry. Although tourism businesses may be relatively low value, they contribute to growth in the wider economy and offer opportunities for employment (and business start-ups) to those who may otherwise not consider themselves equipped with the skills, or who may not have wider aspirations, to start up their own business.

CO_2 emissions

2.22 Finally, a comment in relation to CO_2 emissions. On this headline indicator, the **Culture, Creativity and Visitor Economy Theme** has the potential to make a negative contribution to regional targets (i.e. more tourism means more travel means more CO_2 emissions).

2.23 The sustainability of the visitor economy is clearly dependent on travel both within Britain and to and from international destinations. Climate change is now a consideration for providers and consumers of tourism services and the industry will have to work within the context of new climate change legislation. The "Economic Case for the Visitor Economy" – cited above – notes that the impact of climate change could be positive or negative and will change the nature of the product being offered in response to consumer demand.

2.24 However, awareness of climate change is accelerating market trends for consumers across a number of sectors and given the rural nature of the region and the wide range of locally distinctive visitor choices, the region has an opportunity to become a market leader in this area. The commercial success of environmentally responsible accommodation providers at the high-value end of the accommodation market, such as Strattons in Swaffham, provides evidence that consumers are making responsible tourism choices.

2.25 The region is seeing good growth in its 'travel by train' offers sold through rail partners National Express and First Capital Connect. However, as many of the region's natural, heritage and locally distinctive tourist sites lie outside of the main towns and cities, there is usually an additional journey to be made from the nearest station to the final destination. This 'gap' could often mean a taxi or bus connection, the availability of which can be inconsistent. To fully exploit the sustainable/responsible tourism market may mean further investment by local authorities to ensure a 'seamless' travel experience.

Conclusion

2.26 Overall then, it is clear that the **Culture, Creativity and Visitor Economy Theme** has an important role to play in relation to several of the high level outcomes – and the targets linked to them –identified in the RES and RSS. It contributes at various different levels.

2.27 One overarching conclusion is that the Theme can potentially contribute significantly to "quality of place", with implications for a basket of high level outcome indicators. The Joint Prospectus prepared by Arts Council East and EEDA asserts that:

> *There is overwhelming evidence that quality of a place is now for many industries one of the main considerations determining where they locate. In a global market place with digital communications, many businesses can as readily operate from Norwich as from the centre of London. And it is clear that for businesses and individuals – especially highly-skilled and creative people - the culture and creative opportunities of a place are significant in where they choose to base themselves to work*

2.28 Similar arguments also apply in relation to places in need of regeneration. A major study completed for DCMS sought to examine exactly the mechanisms through which cultural interventions have led to regeneration benefits. Its key findings – in relation to evidenced outputs/outcomes – are summarised in Box 2-2,

2.29 More recently the cross cutting benefits of engagement in cultural activities has been reinforced by Government's inclusion of cultural engagement indicators in the (NI8-NI11) in the National Performance Indicator set. This, and the potential for culture to contribute across a range of other indicators, provides a framework for culture to be embedded within Local Area Agreements.

Box 2-2: Contribution of culture to Regeneration Benefits[4]

Contribution of culture to environmental (physical) regeneration is evidenced in:

- Re-use of redundant buildings
- Environmental improvements
- Increased public use of space leading to reduction in vandalism and an increased sense of safety
- Pride in a place
- Development of live/work and mixed-use space (sustainable development/liveability, 'compact city' - high density, low environmental impacts, e.g. transport/traffic)
- The employment of artists on design teams

[4] *The contribution of culture to regeneration in the UK: A Review of Evidence* A report to DCMS by Graeme Evans and Phyllida Shaw, 2004

- The incorporation of cultural considerations into future plans

Contribution of culture to economic regeneration is evidenced in:
- Inward investment (public-private sector leverage)
- Higher resident and visitor spend
- Job creation (direct, indirect, induced)/wealth creation
- Employer location/retention
- Retention of graduates in the area (inc. artists/creatives)
- A more diverse work force (skills, profile)
- A driver in the development of new business, retail and leisure areas
- More public-private-voluntary sector partnerships
- More corporate involvement in the local cultural sector (leading to support in cash and in kind)
- Increased property prices (residential and business)

Contribution of culture to social regeneration may be evidenced by:
- A change in residents' perceptions of the place where they live
- Greater individual confidence and aspiration
- A clearer expression of individual and shared ideas and needs
- An increase in volunteering
- Increased organisational capacity at local level
- Increased social capital – 'the norms and networks that enable collective action' (World Bank)
- A change in the image or reputation of a place or group of people
- Stronger public-private-voluntary sector partnerships
- Reduced school truancy/offending behaviour
- Higher educational attainment
- New approaches to evaluation, consultation and representation

2.30 A second important conclusion is equally cross-cutting. It relates to the role of the **Culture, Creativity and Visitor Economy Theme** in relation to the knowledge economy – which is absolutely critical to the East of England and it is implicit within a number of the high level regional outcomes.

2.31 There is a growing body of literature which suggests that creativity is an increasing source of competitive advantage across all activities which are in some sense knowledge-based. A recent report commissioned by DCMS and completed by Will Hutton and the Work Foundation[5] argued that:

> *Firms find it increasingly difficult to distinguish themselves from the crowd of competition. It is in industries where the bulk of transactions are difficult to script, where firms rely on the staff's expert capacity to solve problems and communicate complex ideas – what McKinsey calls 'tacit interactivity' – where the gap between the performance of firms is widest. In general, a new source of competitive advantage is opening up, one in which the capacity to deploy knowledge creatively gives the crucial edge. Thus, the creative industries should be understood as part of a wider narrative in which creativity is of increasing importance generally. The task is "not just to encourage creative industries, our priority is to encourage all industries to be creative". (para 3.17-3.19)*

2.32 The report went on to explain – in particular – the critical link between creativity and innovation:

[5] *Staying ahead: the economic performance of the UK's creative industries* Report by Will Hutton and the Work Foundation to DCMS, June 2007, Crown Copyright

> *Traditionally, innovation was conceived in hierarchical and linear terms: the elite science universities or the laboratories in the large corporations would generate a flow of inventions that in turn would be commercialised. If innovation was poor, it was because of weaknesses within the university, research laboratory or the commercialisation process. This was essentially driven by each top-down function in the chain. Newer understandings conceive innovation as a more systemic process, with an accent on smart and effective coordination of a much more democratised system in which high skills are widely diffused. Key skills for innovation are not just restricted to those involved in, say, in Research & Development and marketing. The workforce is no longer asked to apply information in a mechanical sequence but also invited to participate, experiment and offer suggestions about how to improve the production process, and management is expected to build feedback back into that – a powerful driver of learning by doing and incremental innovation. (para 3.66-3.68)*

2.33 Hence the role of the **Culture, Creativity and Visitor Economy Theme** in relation to the wider ambitions of RES and RSS needs to be understood at two distinctive levels: in relation to the outcomes and impacts it can generate directly and in relation to its more cross-cutting and enabling roles with regard both to "quality of place" and the knowledge economy.

2.34 The Regional Strategies Group of cultural agencies is committed to working with Insight East to further develop the evidence base for culture's contribution. This will link to national work being undertaken by MLA, Arts Council, English Heritage and Sport England to understand the evidence need required to support the development of Single Regional Strategies. .

Strategic framework provided by the RES and RSS

2.35 Both the RES and RSS recognise the importance of culture, arts and creativity, as defined in the context of this Theme.

Regional Spatial Strategy – The East of England Plan

2.36 In **RSS**, this is captured in a number of policies which are set out below.

Box 2-3: Policies from RSS linked to the Culture, Creativity and Visitor Economy Theme

Policy C1: Cultural Development

Local Development Documents and the wider strategies of local authorities should include policies that support and grow the region's cultural assets. In doing this local authorities should:

- take account of the Regional Cultural Strategy and any local cultural and community strategies and liaise with Living East, including in regard to site allocations for cultural facilities; and
- recognise the contribution that cultural sectors can make to regeneration and urban and rural renaissance, particularly in the priority areas for regeneration.

Policy C2: Provision and location of strategic cultural facilities

Regionally or nationally significant leisure, sport, recreation, arts, tourism or other cultural facilities should be supported in locations where proposals:

- will enhance existing facilities of regional or national significance or, elsewhere, reflect a sequential approach – with priority to locations in town centres before off-centre or out-of-town locations, and to the use of brownfield land in preference to greenfield sites. Exceptionally the specific attributes of a rural site may make it appropriate for a regionally strategic proposal;

- are designed to enhance the environment and do not adversely affect areas designated for their ecological, landscape or historic value, including sites of European or international importance for nature conservation;
- meet sustainable development objectives as outlined in this RSS;
- maximise opportunities to use means of transport other than the car and use transport networks that have adequate capacity to accommodate passenger and rail freight requirements;
- are well related to regional transport nodes (Policy T5);
- minimise their use of energy and natural resources and impact on public services, and have satisfactory proposals for minimising their long-term use and impact; and • are of an appropriate scale and impact.

The above criteria may be met by the introduction of measures to ameliorate or mitigate adverse effects. Proposals that meet the above criteria and would benefit a priority area for regeneration should be given particular support.

Policy E6: Tourism

- Include policies to encourage realistic and sustainable investment in the maintenance, improvement, regeneration, extension and diversification of the region's **tourist industry**;
- Recognise that much tourism potential is based upon the presence of specific local features or assets e.g. the coast and the historic cities of Cambridge and Norwich. Proposals for tourism development should be fully sustainable in terms of their impacts on host communities, local distinctiveness and natural and built environments, including by avoiding adverse impact on sites of national, European or international importance for wildlife; and
- Integrate with other plans and strategies for managing tourism, particularly local and regional tourism strategies and visitor management plans, especially those for regenerating seaside resorts and extending employment outside the traditional tourist season.

Policy ENV 6: Historic Environment

- In their plans policies, programmes and proposals local planning authorities and other agencies should identify, protect, conserve and where appropriate, enhance the historic environment of the region, its archaeology, historic buildings, places and landscapes, including historic parks and gardens and those features and sites (and their sdettings) especially significant in the east of England

Policy SS9 (The Coast) calls for an integrated approach that recognises the economic and social role of the region's ports, seaside towns and coastal areas, which are important to tourism.

Sub-Regional Polices

A number of sub-regional policies, including ETG1, HG1, GYL1 and NR1, make specific references to the importance of developing tourism in a sustainable manner, whilst protecting the natural assets and heritage of the sub-regions. This particularly reflects the strengths that the sector plays in the sub-regional economy. Policy NR1 is very specific in identifying that Norwich should be 'promoted' as a destination for tourists and visitors

2.37 From **Policy C2**, the emphasis is on the provision of strategic cultural facilities in locations which are appropriate – principally urban areas which are well located in relation to the transport network. This has some resonance with **Policy E6** with its emphasis on sustainable tourism. However for **Policy E6**, the spatial focus is broader and the role of tourism in relation to coastal economies is emphasised – linking with **Policy SS6.**

2.38 **Policy C1** makes specific reference to the Regional Cultural Strategy. *A Better Life* was developed by Living East (Regional Cultural Consortium) and launched in 2005. It has the overall ambition "*to put culture at the heart of the region's future*". To provide a focus for the development of the cultural sector in the region in the future, it identifies four areas which it considers to be key to the development of culture in the region over the next 10–20 years. These priority themes are summarised as:

- embedding culture in growth and regeneration

- developing creativity – focusing on skills and related business opportunities
- growing cultural tourism, and
- capturing the benefits of the London 2012 Olympic Games and Paralympic Games.

Regional Economic Strategy

2.39 Within the **RES**, the issues and opportunities relating to culture, creativity and the visitor economy – as defined in the context of the East of England Implementation Plan Theme – feature most strongly within the spatial economy goal and, more precisely, within Priority 2 ("increasing economic gain from the region's distinctiveness and identity"). This emphasises the importance of culture in regeneration and economic development and it also flags the importance of culture as part of "place shaping". Additionally, the opportunities linked to the London 2012 Olympic Games and Paralympic Games are specifically identified.

2.40 Within the RES, a number of implementation priorities are identified of direct relevance to this Theme:

- protecting and conserving the region's key cultural and historic landscapes
- developing a network of internationally important cultural centres of excellence and creative quarters in our leading cities.

2.41 The RES also identifies a number of core indicators on which progress in implementation will be monitored:

- visitor numbers to regional attractions.
- rate of change in regional tourism spend
- use of public libraries, galleries and museums.

3: Implementation imperatives to 2021/31

3.1 Chapter 2 demonstrated that the **Culture, Creativity and Visitor Economy Theme** has an important role to play in delivering the high level outcomes set out in both RES/RSS, and that a number of strategic priorities have been identified – across both strategies – in response. Quantifying exactly the contribution of the Theme is difficult because interventions are invariably part of the mix, working alongside a number of other Implementation Plan Themes, most notably Housing; Skills and Employability; and Innovation, Enterprise and Business Support.

3.2 In this Chapter we move from strategy to implementation by considering in turn:

- key aspects of the current delivery landscape, including major planned interventions
- the scale of resources that are available for interventions linked to this Theme
- the rationale – in summary – for public sector intervention
- the Programmes of intervention identified by partners in the context of the East of England Implementation Plan

Current delivery landscape, including major planned interventions

The strategic organisational framework for developing the visitor economy in the East of England

3.3 Since 2003/2004, RDAs have been responsible to Government – through the Department for Culture, Media and Sport (DCMS) – for the development of tourism in their regions. DCMS provides £3.5m nationally for the RDAs' single pot, of which EEDA receives approximately £250,000.

3.4 In December 2005, EEDA agreed a strategic framework plan for delivering the region's tourism strategy, noting that:

- tourism development, including marketing, is delivered at many levels in the region; and
- tourism development is neither the work nor the responsibility of any one organisation.

3.5 With regard to tourism, Table 3-1 below summarises key delivery responsibilities.

Table 3-1: Delivery responsibilities in relation to Tourism

EEDA [regional]	East of England Tourism (EET) [regional]
• economic priorities and targets	• regional tourism business and skills development
• policy development	• quality policy and monitoring
• capital and revenue investment priorities	• regional ICT destination management platform

EEDA [regional]	East of England Tourism (EET) [regional]
• advocacy for tourism • regional tourism strategy, including the framework for tourism delivery • regional tourism business and skills development • regional research and intelligence • coordination with sub-regional partners on regional tourism strategy development and strategic initiatives • liaison with Government • liaison with other RDAs on national tourism initiatives, including Partners for England	• regional visitor information • regional research and intelligence • long-term product development and investment • regional image marketing • regional theme marketing • developing the potential of the business tourism market • coordination with sub regional partners on marketing and related issues • liaison with VisitBritain
Sub-regional ["county-level"]	**Local**
• sub-regional visitor information • brokering of business support services • brokering of skills advice and training • business tourism e.g. convention bureaux • identification of investment priorities for sub region • coordination of marketing plans and print production • coordination of events • dissemination of research and intelligence • promotion of quality improvements and quality assurance schemes	• destination management • visitor information • data collection to regional specification • local events • local attractions • local promotion • local IT platform linking to regional platform • promotion of quality improvements and quality assurance schemes

"Creative collaborations: delivering change"

3.6 *Creative collaborations: delivering change* is the joint prospectus between EEDA and Arts Council England East (ACEE) and it was developed as a medium-term commissioning product and a pilot for new approaches to strategic investment for the Corporate Plan 2005-8.

3.7 The joint prospectus built upon a major joint research exercise between EEDA, ACEE and Living East (which was wound-up in 2008), which established a clear evidence base and examined trends in the Creative Industries sector. This underpinned the development of a regional cultural and creative industries strategy in May 2004.

3.8 *Creative collaborations: delivering change* focused specifically on the music, visual and performing arts sub-sector where EEDA and ACEE had identified common interests. The prospectus was framed on three shared objectives which resulted from a clear understanding of the evidence base, a synthesis of regional economic strategy (RES) goals and ACEE national and regional priorities and agreement of a clear set of results. It then set out a limited number of interventions to deliver these results.

3.9 During the period 2005-8, significant progress was made in identifying and progressing delivery of a portfolio of transformational projects. The EEDA and ACEE Management teams are currently reviewing progress on the initial investments and in the light of emerging impacts they are also refreshing the prospectus for the period 2008-11.

3.10 A key element of the new shared prospectus will be the further development of the evidence base, working closely with the new regional intelligence centre, Insight East. This will form part of a co-ordinated approach to the cultural evidence base that will link to the national collaboration of cultural agencies and the data requirements of integrated regional strategies.

3.11 It will be a priority to understand employment trends within the creative economy in the region. DCMS statistics indicate that this region is the third most significant in the country for employment in the sector, however they also suggest that over the period 2003-2006 the region experienced a decrease of 0.5% whilst nationally there was a 5.3% increase. DCMS is reviewing the methodology and it is known that it fails to detect small enterprises, however it is possible that the there is a downward trend in this region, especially in the light of the recent economic downturn. Bearing in mind the significance of the creative economy nationally and regionally it will be important to clearly understand and effectively support the sector in this region.

On-going projects: new or planned facilities

3.12 As a result of both of these ventures, the region is seeing significant growth in new or planned facilities that will further raise the region's offer and profile. Some of the key projects include:

- The **Olympic White Water Canoe Centre** at Waltham Cross, Hertfordshire; and the proposed **Olympic mountain biking course** at Hadleigh, Essex;
- The continuing expansion of **Colchester Zoo**, one of the two most visited zoos outside London;
- A new **Center Parcs** development in Bedfordshire;
- The development of the **Imperial War Museum at Duxford**, including the new Air Space hangar;
- An extended visitor offer at **Audley End House** and **Framlingham Castle** and the National Trust's new visitor facilities at **Anglesey Abbey**.
- **Snoasis**, near Ipswich;
- **Nirah**, near Bedford;
- A £5.7m conservation centre including the **East Anglian Film Archive, Norwich** which opened in 2004; and a **People's Digital Archive** will provide 24 public access points across the region together with a British Film Institute **Mediatheque** in Cambridge;
- **Cinema City, Norwich** developed as a 3 screen cinema and is one of 22 connected **Digital Screen Network** cinemas across the region equipped to screen all digital formats;
- The future of the regional studio infrastructure facilitating the **Harry Potter franchise** and **'EastEnders** in **Hertfordshire and Batman Begins and The Dark**

Knight in Bedfordshire is the subject of regional, national and international decisions**;**

- An centre of excellence in **'performance capture'** for film, computer games and advanced performance arts is being evaluated;

- 6 county-wide **Media Education Partnerships** stimulate investment in 'young' film and media and are developing a region-wide **Children's Film Festival** with the **BBC**;

- Development of Europe's leading campus for **Classical Music at Aldeburgh** (Aldeburgh Productions) where top established artists will work alongside the next generation of musicians

- Creation of the **UK Centre for Carnival Arts in Luton**, facilitating business and skills development and intercultural community development activity;

- Development of **FirstSite:NewSite in Colchester**, a landmark visual arts facility designed by world renowned architect Rafael Vinoly. Despite construction issues, this is set to be a major stimulus to the visitor economy in the region;

- Land assembly and development of the **Production Campus in Thurrock**, which will house the production facilities of the Royal Opera House, a National Skills Academy for Creative Production, community and creative industry incubator spaces

- Development of the **Jerwood DanceHouse in Ipswich** as part of the major redevelopment of the Ipswich Waterfront, and home to Dance East, one of the UK's leading dance organisations

- Relocation of **Metal** to a new facility in Southend to support regeneration activities in Thames Gateway and cultural development work leading up to the London 2012 Olympic Games and Paralympic Games

- Proposed redevelopment of Southend's Central Library to provide library resources for the public, HE and FE from a single location, combined with a creative economy hub. The latter will focus on the development of incubation space alongside curriculum development to enhance Southend's emerging digital media specialism.

3.13 Regional and sub-regional public sector partners are already involved with a large number of these projects as a capital investor, and will continue to work with the projects as they open to ensure the buildings deliver high levels of impact. Some of these projects are driven by the private sector but are included in recognition of their significance to the region.

Resourcing and the scale of "the gap"

3.14 Notwithstanding the progress that has been made, the East of England typically has the lowest allocation of resources from Government and national bodies including for Arts Council East and EEDA. EEDA's revenue and budgets are likely to decrease by 17% in real terms over the next 3 years and Arts Council East's Lottery budget has reduced by more than 35% since

2007 due to top-slicing for the London 2012 Olympics, which also means much reduced availability of capital investment.

3.15 On the tourism side, EEDA is a core funder of East of England Tourism (EET). However the level of resources available to support tourism and the visitor economy in the East of England is the lowest across the regions of England. Direct RDA direct investment in tourism from 2003/04 to 2007/08 is shown below:

Expenditure on tourism					
£ million					
RDAs	*2003-04*	*2004-05*	*2005-06*	*2006-07*	*2007-08*
AWM(1)	0	2.2	2.3	3.8	3.3
EEDA(2)	0.6	0.6	0.8	1.5	1.8
EMDA	1.9	3	4.5	5.3	4.7
LDA(3)	13.3	23.7	23.8	23.9	29.4
NWDA	2.7	4	5	6.1	8.9
ONE(4)	0.75	3.3	7.1	10.8	10.6
SEEDA	1.2	1.8	2.4	2.2	2.2
SWRDA	0.8	1.5	3	3.2	2.6
YF	0.6	1.7	2.2	3.9	6

3.16 EEDA's direct support for tourism is in 2008/09 is £1.1 million, which is a significant reduction on previous years. This is primarily because the region is no longer able to financially support sub-regional tourism development. It is understood that this bucks the trend across other regions, which are investing to support this significant economic sector, and also in the lead up to the Olympics in 2012.

3.17 At local and sub-regional levels, tourism funding by local authorities is entirely discretionary, with significantly varying degrees of investment by local authorities. In the East of England, some local authorities do not provide any funding to support tourism

Purpose of – and rationale for – intervention

3.18 With further pressure on the public purse, sustained large-scale growth across the region, and no imminent change of public policy on the horizon, resources are getting scarcer and high impact investment is even more essential. This makes having a focused joint investment portfolio essential, and the region's successful track record in pulling in other investors will help to attract and broker other partners to achieve the region's shared ambitions.

3.19 Moreover, in realising the potential linked to the **Culture, Creativity and Visitor Economy Theme**, there is a need for a radical re-think in the manner that public sector intervention is understood. In their report to DCMS, Will Hutton and the Work Foundation argued that[6]:

> *The single most important step is to move from a paradigm in which support for the creative industries is interpreted in terms of subsidies and grants, to one where it is instead understood in terms of investment with important economic and cultural paybacks. There is clearly more work to be undertaken in understanding the complex linkages and spillovers within the core creative industries and between them and the wider economy – not least in organising hard data and systematic statistics on which evidence-based judgements can be made.*

3.20 Other studies have examined some of the market failures that exist with regard to the **Culture, Creativity and Visitor Economy Theme** and hence the rationale for public sector intervention**.** Deloittes, for example, has identified a number of market failures with regard to the visitor economy[7]. These can be generalised across much of the Theme:

- **Information gaps (asymmetries):** This market failure arises where businesses and consumers suffer from information gaps. Tourism businesses, for example, know what their 'offer' is and how attractive the destination is for tourists. However they do not know the tourist's willingness to visit and pay. A market failure exists because there is no incentive to market a destination by a tourism business (in fact there are business incentives NOT to do this – see 'free rider' failure below) and therefore there is a requirement on the public sector to bridge this information deficiency and to support the sector regionally. Interventions such as destination marketing websites and the regional destination management system start to address this failure.

- **Free rider problem:** A major market failure which affects much of the **Culture, Creativity and Visitor Economy Theme** is that there is likely to be no equivalent provision of marketing and coordination by the private sector due to the 'free rider' problem. Due to the fragmented nature of the industry, individual business or a group of businesses are unlikely to market a place (country, city or region) to international or domestic tourists. In addition, many tourism providers perceive themselves as being in direct competition with their immediate neighbour rather than with other destinations, which is a perceived disincentive for them in considering destination marketing. EET are responding to this market failure but within the region there are few large tourism or tourism related commercial businesses on which commercial funding support for the marketing programmes can be secured. Given the region's high proportion of SME tourism businesses, securing funding is costly and time consuming and therefore the 'free rider' market failure is arguably more of a factor in this region than in many other regions.

[6] *Staying ahead: the economic performance of the UK's creative industries* Report by Will Hutton and the Work Foundation to DCMS, June 2007, Crown Copyright
[7] *'The Economic Case for the Visitor Economy'*, September 2008, prepared by Deloitte for Visit Britain and the Tourism Alliance, www.visitbritain.com/en/campaigns/tourism-review/reports.aspx

- **Externalities:** There are significant positive and negative externalities arising from the **Culture, Creativity and Visitor Economy Theme**. Positive externalities exist where other businesses and consumers benefit from activities linked to the Theme. For instance, these include increased choice for domestic residents and preservation of the UK's heritage, reinforcing the attractiveness of the UK as a location from which to conduct international business. Negative externalities exist where other businesses and consumers are adversely affected. Examples include the congestion impacts of tourist traffic in more popular destinations and erosion of natural heritage where open access to spaces can lead to both economic and environmental overexploitation of the natural environment.

- **Skills gaps:** Provision of skills is critical across the **Culture, Creativity and Visitor Economy Theme**. Large businesses provide training for specialist skills but the majority of small businesses in the sector are not able to support the development of the necessary skills. Seasonality of employment provides limited incentive for businesses to invest in skills, particularly where employee turnover is also high.

Programmes for Intervention

3.21 Against this backdrop, partners in the East of England have identified five regional-level programmes for intervention. These are:

- Maximising the growth of the creative economy
- Skills and creativity for life
- Culture at the heart of places and sustainable communities
- Growing and sustaining the visitor economy, and enhancing the profile for the region through its places, natural heritage, cultural assets
- Place positioning through culture

3.22 In Chapter 4, each of these programmes is described in more detail, focusing on the rationale for intervention, the required scale of resources and the outputs, outcomes and impacts that might be achieved.

4: Programmes

See the East of England Implementation Plan for published details of the regional programmes for this theme.

Annex A: Other Supporting Evidence

The Economic Impact Study of the London 2012 Olympic Games and Paralympic Games[8]

A.1 In 2006, EEDA and other partners commissioned an Economic Impact Study to examine the benefits that the Games could bring to the region.

A.2 The Economic Impact Study demonstrates that tourism is the business sector that could deliver the greatest economic benefits for the region from the Olympics, as long as the opportunity was proactively exploited. The Economic Impact Study has also acted as a driver for specific activities and interventions since its publication and has directly led to the development of the Regional Olympic Business Plan, "Rising to the Challenge". A number of key areas that should be developed to ensure that the benefits are fully realised are outlined within both the Economic Impact Study and the Business Plan.

A.3 From an assessment of the Economic Impact Study it is possible to distil some priority interventions. These are set out below.

Regional Economic Impact Study of the London 2012 Olympic Games and Paralympic Games - Summary of Priority Interventions for the 'Tourism' theme	**Period of intervention identified in EIS**	**Lead Responsibility**
(1) Improve the quality of visitor accommodation - develop and improve the quality of accommodation offered to visitors by:	**2008 -**	**EET, sub-regional partners**
(a) audit of gaps in the quality of provision		
(b) encouraging take-up of standardised quality ratings		
(c) facilitating programmes such as Welcome Host		
(2) Improve the quantity of visitor accommodation - improving the provision of visitor accommodation by:	**2008 -**	**EET, sub-regional partners**
(a) Identifying gaps in the provision of hotel rooms in terms of quantum and type of rooms, particularly around 2012, and encourage new hotel supply development within growth area developments as appropriate.		
(b) communicating opportunities to developers and sub-regions		
(3) Improve the tourism product, including customer service standards and skills	**2008 -**	**EET, sub-regional partners**
(a) Attracting Major events.	2008 onwards	EEDA
(b) Increasing/improving the quality and quantity of conference/exhibition centre capacity to appeal to the business tourism sector.	2008 - 2012	Sub-regional partners
(c) Customer service skills - expand programme (such as Welcome Host) to other businesses likely to come into contact with tourists and spectators.	2010-2012	EET, sub-regional partners
(d) Coordination of transport solutions - including accessibility to key attractions and events, information on provision (a coordinated Gateway "Transport Plan" for Stansted, Luton etc).		
(d)(i) Transport Gateway promotion	2010-12	
(e) Developing new products/promoting existing products more successfully.		
(4) Promote and market the region and sub-regions (Olympic themes and post-2012 actions)	**2008 -2016**	**Sub-regional partners, EET**

[8] The Economic Impact Study of the London 2012 Olympic Games and Paralympic Games, July 2006, Prepared by Grant Thornton for EEDA www.eastofenglandobservatory.org.uk/viewResource.aspx?id=15047

(a) Target the retention of domestic visitors during the Olympic period through a "business as usual" message.	2011-2012	EET, sub-regional partners
(b) Promote accommodation in parts of the region with direct train linkages to London stations	2011-2012	EET, sub-regional partners
(c) Promote cultural events around the time of the Olympics through marketing material	2011-2012	EET, sub-regional partners
(d) Undertake a programme of sports, cultural and business-tourism promotional campaigns as well as general tourism in the lead up to 2012 and continue afterwards, focussed on unique strengths of the region.	2008-2016	EET
(e) Develop an approach to marketing and promotion which includes regional coordination and sub-regional collaboration (and see p142).	2010-12	EET, sub-regional partners
(f) Promote the region as a destination for conference and business travel/meetings leveraging the strength of the region in terms of its proximity to the 2012 Games		EET
(g) Promote the region's unique sporting strengths around the WWCC and mountain biking venues and use these events to promote activity based tourism	2010 - 2016	EET, sub-regional partners

(5) Provision of information to international visitors	**2008/9 -**	**EET, sub-regional partners**

A.4 As a result of intervening in these priority areas, and addressing the market failures through public sector intervention, the Economic Impact Study estimates that the visitor economy could contribute additional spending for the East of England of around £200m additional turnover under a central scenario (equivalent to £100m GVA) to £400 million under the high scenario over the 2006-2016 period.

A.5 However, as well as interventions to increase the general level of tourism, the Economic Impact Study recommends specific targeting of different sub-segments of the international tourism market. For example, increasing only the business tourism market by 3% would have a much greater impact, worth some £300 to £600 million (with an impact of around £150m GVA in the central case).

A.6 Economic modelling within the Economic Impact Study points to the potential for a negative impact on the region's GVA from the 2012 Games. A key issue is a drain of activity from the region to London, with less economic activity taking place in the region. The baseline impact on specific elements of the visitor economy is outlined in the table below.

Table A-1 : Gross value added by sector, East of England (£ million) – “do nothing” scenario

	2005-2011	2012	2013-2016	Total
Hotels & Catering	0	-2	-1	-3
Hotels	-3	-4	-2	-9
Other accommodation	-1	-1	0	-1
Restaurants	-8	-4	-6	-19
Bars	-2	-2	0	-5
Air transport	4	3	12	18
Travel agents	-4	-1	-2	-7

	2005-2011	2012	2013-2016	Total
Visitor attractions	-2	1	0	-1
Total	**-16**	**-10**	**1**	**-27**

A.7 Therefore in view of the potential negative impacts from the baseline ("do nothing") position, it is important to intervene not just to secure benefits for the East of England, but also to manage and mitigate the risk of negative impacts on the visitor economy.

A.8 The Economic Impact Study is entirely compatible with the Regional Tourism Strategy, and therefore much of the current and planned short-term regional tourism activity is underpinned by the need to address and maximise the benefits from the Games, and minimise and mitigate risks through displacement effects on the visitor economy as a result of the Games. However, in the longer-term, the issues remain the same or similar.

A.9 EET, working with EEDA, is the only body at regional level able to market the region nationally and internationally to consumers for the Olympics; and it is the only regional organisation able to coordinate and resource the regional visitor economy partnerships in order to realise the Olympics opportunity.

The Visitor Economy in the East of England

Where are we now?

A.10 In a recent Deloitte report[9] for Visit Britain and the Tourism Alliance, it is estimated that the Visitor Economy in Britain delivers a significant 'Direct' contribution to the economy of £52 billion or 3.7 per cent of GDP. The Visitor Economy also directly supported over 1.36 million jobs in 2007. Total spending in the Visitor Economy has risen in nominal terms from £85 billion in 2005 to £86 billion in 2007.

A.11 The Deloitte report also highlights the significant indirect impacts of the Visitor Economy through its interaction with other businesses in the supply chain. Deloitte estimate that the total (direct and indirect) impact of the Visitor Economy in Britain was 8.2 per cent of national GDP in 2007 – equivalent to around £114 billion. In the longer term it is expected that the industry's overall economic impact (direct and indirect) will be significantly larger in absolute terms – £188 billion by 2018 compared to £114 billion in 2007 – but will account for a similar proportion of the overall UK economy as 2008 at just under 8 per cent.

A.12 In the East of England, tourism is one of the region's largest business sectors worth over £5 billion and it employs more than 180,000 people. There are approximately 8,000 businesses directly involved in delivering services to leisure and business visitors. Tourism is the largest industry in Norfolk and Suffolk and is significant in all parts of the region. Even in Bedfordshire - the sub-region with the least developed visitor economy - tourism accounts for approximately 5% of the work force.

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[9] 'The Economic Case for the Visitor Economy', September 2008, prepared by Deloitte for Visit Britain and the Tourism Alliance, www.visitbritain.com/en/campaigns/tourism-review/reports.aspx

A.13 Although the significance of the visitor economy is considerable, the region's tourism businesses are generally small to medium-sized, reflecting the nature of the region: predominantly rural, no large conurbations, and mainly medium-sized towns.

A.14 The East of England has a diverse tourism product and also has two major international airports – Stansted and Luton – with around 12% of the UK's international arrivals entering via Stansted. There are plans to expand the region's other two airports at Norwich and Southend. In addition the region is very well served by ferries through its major international ports, particularly Harwich. However in 2007 the International Passenger Survey[10] results showed that despite 12% uf UK international arrivals being through the region's gateways, only 6.7% of visitors to the UK stayed in the region; and only 4.7% of international passenger spend was within the East of England. This demonstrates a significant leakage of passenger arrivals from the region, and therefore if the region is going to achieve the RES indicators (as set out earlier) then part of the challenge is turning the region from a gateway and into a destination of choice.

A.15 Clearly the region is clearly punching well below its weight in terms of the Visitor Economy. Therefore significant opportunities exist to boost the Visitor Economy and deliver the high-level aims, objectives and targets of the RES and RSS; although uniquely this also needs to be managed within the context of potential negative influences resulting from the London 2012 Olympic Games and Paralympic Games, whilst maximising the opportunities afforded by such a significant opportunity. However, the visitor economy is well placed and poised to grow. In 2007[11] the value of domestic tourism increased by just 1.6% nationally; but the East of England bucked the national trend with 15% growth - an extra £196 million for the regional economy.

Table A-2 : Volume and Value of Tourism in the English regions

Volume and Value of Tourism in the English Regions

Region	Total Visits (m)	Total spend by visitors (£m)
London	155.5	14086
South East	216.3	10051
South West	101.7	6742
North West	121.6	6064
East of England	132.8	5122
West Midlands	248.1	4256
East Midlands	79.5	3799
Yorkshire & Humberside	98.5	3671
North East	35.3	1707

Sources: UKTS 2007, IPS 2007, GBLDVS 2002/03

A.16 Table A-3 below provides a more detailed analysis of the volume and value statistics across the English regions. An analysis of this shows that:

[10] International Passenger Survey 2007, Office of National Statistics, www.tourismtrade.org.uk/MarketIntelligenceResearch/InboundTourism/IPShomepage.asp
[11] UK Travel Survey, 1997, Visit Britain, www.tourismtrade.org.uk/Images/England%202007_tcm12-42274.pdf

- Tourism spend in the region is £38.60 per visit is ranked 7th of the 9 regions, and is below the average spend per visit (£49.20 per visit) of the English regions.
- Tourism spend in the region currently equates to £5.122 billion.
- However, if the total visits remained constant at 132.8 million but the spend per visit rose to the national average then this would increase total spend in the region to over £6.5 billion per annum (or £5.84 billion per annum if London was taken out of this calculation).

Table A-3 : Analysis of Volume and Value of Tourism in the English regions

Region	Total visits (m)	Rank (visits)	Total spend by visitors (£m)	Rank (total spend)	Spend per visit	Rank (spend per visit)
London	155.5	3	14,086	1	90.6	1
South East	216.3	2	10,051	2	46.5	6
South West	101.7	6	6,742	3	66.3	2
North West	121.6	5	6,064	4	49.9	3
East of England	132.8	4	5,122	5	38.6	7
West Midlands	248.1	1	4,256	6	17.2	9
East Midlands	79.5	8	3,799	7	47.8	5
Yorkshire & Humberside	98.5	7	3,671	8	37.3	8
North East	35.3	9	1,707	9	48.4	4

Source: UKTS 2007, IPS 2007, GBLDVS 2002/03
Analysis by EEDA