
South East Creative Economy Network

A Strategic Framework for
Creative Workspace in the South East

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1. INTRODUCTION

1.1 What is the Strategic Framework?

This Strategic Framework has been developed on behalf of the South East Creative Economy Network (SECEN) with the aims of:

- Establishing a region-wide, co-ordinated approach to supporting the growth of the South East¹ creative economy, with a particular focus on developing creative workspace;
- Supporting decision-making in how best to support the creative industries in different parts of the region; and
- Developing a more consistent and evidence-based approach to investment and project prioritisation.

It provides a practical approach to implementing the different types of support that are needed in diverse types of places, based on SECEN's investment priorities: Stimulating Growth; Enabling Place-making and Generating Social Value.

This Strategic Framework is for Local Authorities and creative practitioners. It is not an inward investment proposition, which would provide a clear narrative about the region's distinctive strengths and the rationale for investment. This will be produced subsequently, responding and supporting this Strategic Framework. This may be produced sub-regionally or on a region-wide basis.

Each place requires interventions that are tailored to the specific needs and demands of the sector at local level. However, better coordination of these interventions at a regional level provides context for local interventions and makes the region's creative economy, as a whole, more effective, more productive and more creative.

1.2 Who is the Strategic Framework For?

The success measures of the Strategic Framework will be based on how it is used by:

- Local Authorities and other public agencies to better understand the role of the creative industries in place-making and to develop appropriate planning policies to support the growth of the creative economy;

- Strategic leaders and stakeholders to develop networks, share best practice and to develop a co-ordinated and collaborative approach to supporting the creative industries at a regional level; and
- Creative workspace investors and developers to make the case for investment in creative workspace projects.

1.3 What Does the Strategic Framework Aim to Achieve?

SECEN's overall aim is to develop an eco-system of workspaces, which supports the scaling of the creative economy regionally and locally.

Context matters: Major infrastructure investments can alter the cultural landscape and improved digital and transport connectivity can change dynamics, both within and between the region's places.

This Strategic Framework supports the commitments and pledges set out in the SECEN Statement of Intent – Creative Places, in particular:

- Seeking funding and investment opportunities to prioritise the growth of creative workspace in the region;
- Influencing governance, planning policy, investment, property development and public asset transfer; and
- Supporting cultural workspace development aligned with funding and investment opportunities.

Providing the right creative workspace is just one of many interventions that are needed to support the development of the creative economy. Other components include developing the skills base, supporting innovation and entrepreneurship, and promoting cultural tourism. The SECEN pledges under these themes are set out in the SECEN Statement of Intent.

SECEN's overall aim is to develop an eco-system of workspaces, which supports the scaling of the creative economy regionally and locally. In the face of devolution plans, there will still be a need for regional coordination to develop the creative industries. This Strategic Framework, therefore, remains relevant and acts as a plan for the South East region, comprising Greater Essex, Kent and Medway and East Sussex.

¹For the purposes of this Strategic Framework, the South East refers to Greater Essex, Kent & Medway and East Sussex.

1.4 What is Creative Workspace?

Creative workspace is any space that stimulates collaborative and individual creative work. It needs to reflect organisational and individual cultures and values. An effective creative workspace allows people to be free to work as they need, to feel their best, and to be innovative. Some workspaces are designed for collaboration, whilst others support focused and individual endeavour, but more are likely to be flexible enough to accommodate both. The types of creative spaces used include:

- Artists' studios.
- Creative Incubators, Accelerators, and Co-working spaces.
- Makerspaces.
- Workspace with creative facilities (i.e. media production, fashion design).
- Bookable specialist production and rehearsal facilities (i.e. theatre, dance, music, recording).

Creative professionals often need access to specialist facilities and equipment, such as hand held tools, specialist woodworking and metal equipment, green screens, 3 phase electricity supply and spray booths. The first step is to understand the businesses, and their needs and demands. Flexible lease arrangements and affordability are also key considerations for creative professionals, whilst the ability to access information and knowledge and to network with others can also be valued highly.

“Meanwhile Uses”, while not universally popular, make use of under-utilised spaces, so that they become productive, often as a precursor for regeneration of a site, or an area. This could be empty shops or derelict buildings, which can be temporarily converted and rented on a flexible and affordable basis over a short term period, allowing for experimentation in the use of urban or rural spaces. These ‘pop-up’ or meanwhile uses often lend themselves well to creative activity.

1.5 Why Invest in Creative Workspace?

The UK has a competitive advantage in the creative industries. In many cases, the market works effectively with established creative businesses occupying creative workspace that they can afford and which meets their needs.

But this is not always the case. The creative industries are fragmented with a high proportion of micro-businesses and freelancers; it relies on collaboration, both in terms of ideas and equipment. Creative clusters are at different stages of development and for many micro-businesses income is project-based and can be inconsistent, making it difficult to commit to long-term and expensive leases. The work, by its nature, is often experimental.

However, the creative industries are known to have a much wider economic and social role than many other sectors, so their outputs do not always reflect the value of their direct income: they can be a key driver of place-identity and civic pride; they can foster community cohesion and they can be vehicles for improving people's health and well-being.

A diverse range of creative workspaces are needed, including studio space, industrial space, rehearsal facilities and complementary offices. Many of these spaces are large-scale (at least 500 sq.m) in order to accommodate production activity. While generating demand on their own, many of the creative sub-sectors are interconnected. For example, set design and fabrication feeds into and underpins film and TV, theatre, dance, and art and design. Creative production also co-exists and supports cultural consumption, often enabling the experience and visitor economy especially in high streets and town centres.

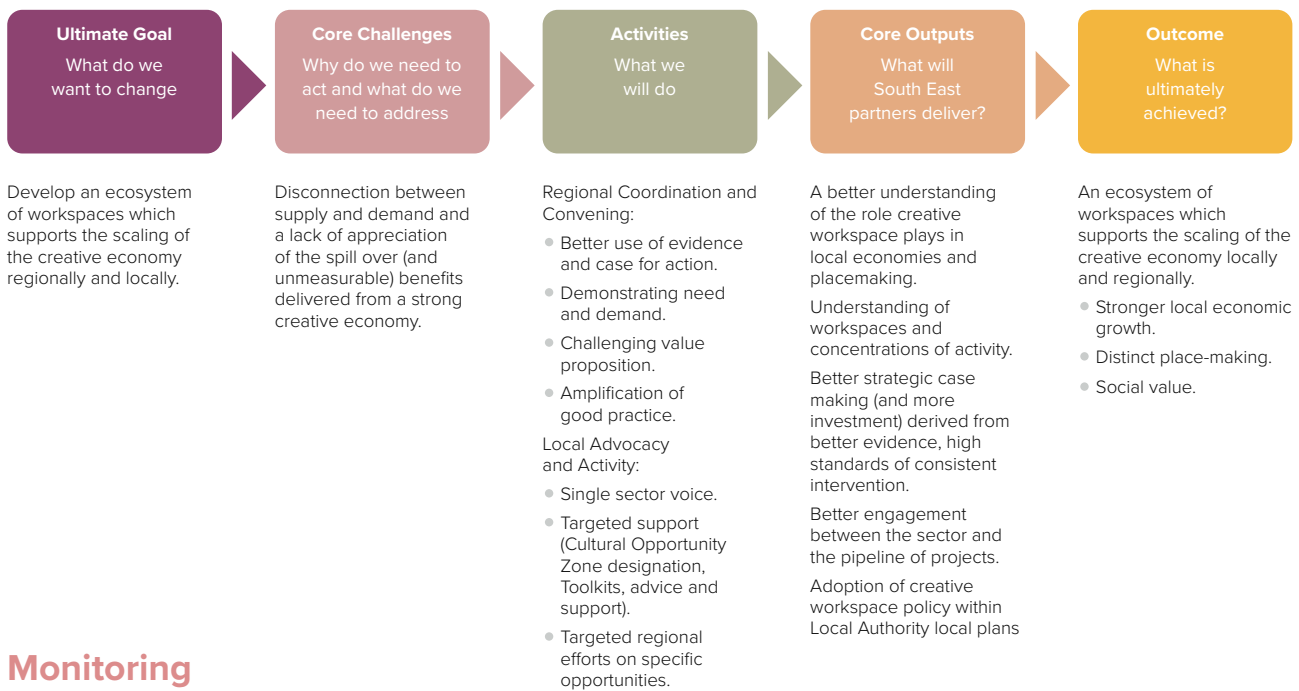
There are strong commercial cases for investing in creative workspace, but there are clear market failures that merit publicly funded investment. This Strategic Framework identifies key criteria to guide investment. It will aid funders and decision-makers when assessing investment priorities.

It will provide Local Authorities and stakeholders with an evidenced rationale for places and projects, presenting a clear opportunity for the sector's future growth and providing an understanding of the different types of support needed in different types of places.

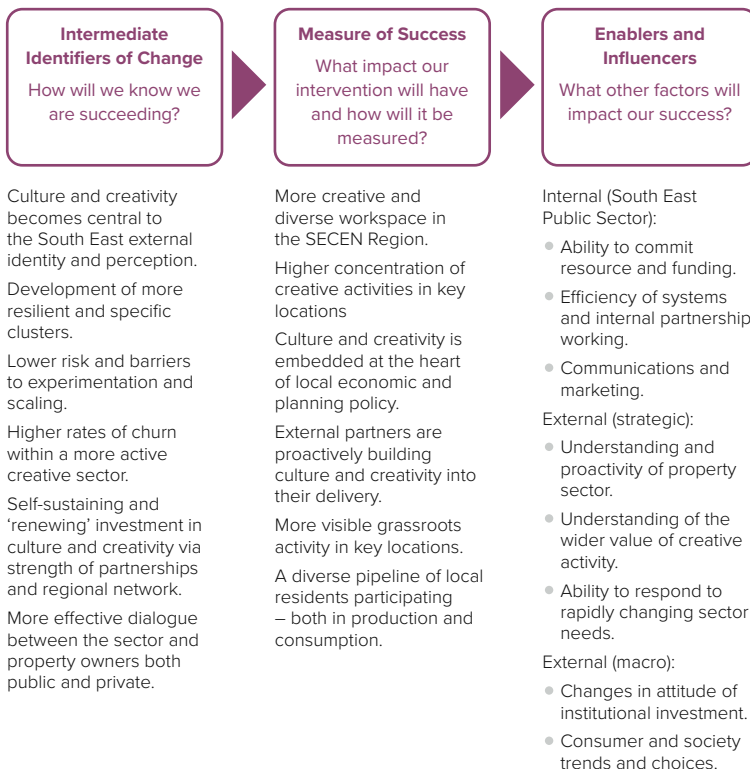
1.6 Theory of Change and Monitoring

The Theory of Change, set out below, shows the core challenges, expected activities, outputs and outcomes. It also provides a headline summary of intermediate and final success measures; and factors that might impact on success.

Theory of Change



Monitoring



1.7 The Strategic Framework Structure

The remainder of the Strategic Framework comprises the following sections:

- **Section 2:** Setting the Context. This section defines the creative industries; sets the policy framework; assesses the contribution of the creative industries to the economy and discusses their role in place-making; identifies barriers to growth; and considers the different types of creative workspace.
- **Section 3:** The Place-Based Analysis. This section describes the methods and assumptions used to develop the analysis; illustrates the analysis itself; and sets out how to use it effectively to improve investment and policy decisions in local areas.
- **Section 4:** The Sector-Based Analysis. This section focuses on the three main broad spatial areas within the South East: East Sussex, Greater Essex and Kent & Medway. It sets out the profile of different sub-sectors of the creative industries in each and what this means for decision-making; and highlighting case study examples of creative workspace projects that are being developed.
- **Section 5:** Using the Strategic Framework and Making the Case for Investment. This section provides a guide to making applications for public funding. It summarises the criteria to prioritise projects and it introduces the Five Case Model, including key concepts that are commonly used by appraisers when assessing applications. It also provides a guide to engaging private sector investors and a summary of factors to consider in project prioritisation.
- **Section 6:** Practical Steps for Local Authorities in Using the Framework. This section provides a practical guide for Local Authorities in terms of how to incorporate creative industries into effective planning policy and what to consider when developing effective governance structures to support their growth. It also provides links to other sources of useful information to enable Local Authority officers and others to support the development of the creative industries across the region.

2. SETTING THE CONTEXT

This section defines the creative industries; assesses the contribution of the creative industries to the economy; sets the policy framework; discusses their role in place-making; identifies barriers to growth; and considers the different types of creative workspace that are required.

2.1 Sector Definitions

This Strategic Framework uses the Department for Culture, Media & Sport (DCMS) definition of the Creative Industries, based on four-digit Standard Industrial Classification (SIC) codes. There are overlaps with the definition of the Digital and Cultural sectors. The DCMS definitions can be amalgamated into the following broad sub-sectors:

- Advertising & Marketing.
- Architecture.
- Crafts.
- Design & Designer Fashion.
- Film, TV, Radio & Photography.
- IT, Software & Computer Services.
- Publishing.
- Museums, Galleries & Libraries.
- Music, Performing and Visual Arts.

Full details of the SIC code definitions are shown in Annex A.

2.2 Employment and Economic Contributions

There are approximately 2.27 million people working in creative industries jobs in the UK², including 1.61 million people (71%) working as employees and a further 667,000 (29%) people working on a self-employed/freelance basis. These proportions are the same as in the wider South East region³ where there is estimated to be 98,000 creative industries' freelancers. There are considerably more males (1.41 million) than females (0.87 million) working in the creative industries; creative industries workers are most likely to be in the 25-34 years age group (29%); and over two-thirds (68%) hold a degree or equivalent qualification.

One third (34%) of all creative industries jobs are in London and 14.5% are in the wider South East region. According to the Creative Industries Council, the sector now accounts for 6.9% of all UK jobs, up from 5.8% in 2015. This represents an increase of 400,000 jobs in the sector over the period.

At UK level, the most significant Creative Industries sub-sector is IT, Software & Computer Services, accounting for 42% of all jobs in the sector. Crafts, by contrast, account for just 0.2% of the sector's jobs. This pattern is even more marked in the wider South East region, where IT, Software & Computer Services accounts for over half (53%) of all the Creative Industries' jobs.

The Creative Industries contributed £97.7 billion to the UK economy in 12 months to June 2021. More recent monthly figures suggest some recovery from the Covid-19 pandemic, but by September 2021, (when the sector contributed £8.5 billion to the UK economy), it still had not recovered to its pre-pandemic levels, when it was contributing over £9 billion to the economy each month.

The direct economic contributions of the sub-sectors vary significantly. IT, Software & Computing (40%) and Advertising & Marketing (17%) account for well over half of the Creative Industries' contribution to the UK economy, whilst Crafts (0.3%) and Museums, Galleries & Libraries (0.8%) make a direct contribution of only around 1%.

Indicative productivity at UK level can be calculated by dividing the 12 month cumulative GVA contribution by the total number of jobs for the whole sector and its sub-sectors. Between July 2020 and June 2021, the 2.27 million Creative Industries workers contributed £97.7 billion to the UK economy, at an average of £42,988 per job filled. However, the direct economic contribution of the sub-sectors varies significantly: GVA per job filled is £74,833 for Advertising & Marketing, but it is just £6,011 per job filled for Museums, Galleries & Libraries.

This wide variation in the direct GVA contribution starts to explain why there is a case for public investment in some of the creative industries' sub sectors in particular. This is explored later in the Strategic Framework. Essentially, if sub-sectors like Museums, Galleries and Libraries or Music, Performing and Visual Arts can be shown to deliver a wider, indirect economic and social contribution (place-making and health and well-being, for example) that do not accrue directly to investors, there is a strong case for public investment.

² Department for Culture, Media & Sport, July 2021-June 2022

³ Definition of the wider South East region – Buckinghamshire, East Sussex, Hampshire, Isle of Wight, Oxfordshire, Berkshire, Surrey, West Sussex and their constituent Unitary Authorities.

2.3 The Policy Framework

Policies constantly evolve and, at the time this Strategic Framework was developed, the UK Government's commitment to publishing a strategy for increasing growth in the creative industries sector had been delayed. Nevertheless, the sector is identified by the UK Government as one of five sectors where the UK has an international competitive advantage⁴.

Whilst the Levelling Up terminology may not stand the test of time, the principles are likely to remain over the long-term. This means a commitment to the place-shaping agenda and to supporting regeneration in areas that have struggled to adapt to changing economic conditions. The creative industries have a critical role in this, as a source of local pride and distinctiveness; a vehicle for improving people's quality of life and community engagement; and an important source of local growth and prosperity.

Although, overall, the South East is a relatively prosperous region, many of its locations, including coastal towns, are isolated and suffer from socio-economic and infrastructural challenges. Many have been the focus of successful cultural Levelling Up Fund and Towns Fund applications, including theatres, museums, galleries and creative workspaces.

2.3.1 Devolution and Sector Deals

Whilst the specifics of spatial and sectoral governance may change, its principles are less likely to do so. Devolution deals are based on the principle that local people are best placed to determine what is needed and demanded in their areas, whilst sector deals acknowledge the same, albeit on a thematic and sectoral basis.

Regardless of how the administrative and political landscape changes, there will continue to be a need for a coordinated approach to developing the creative industries at a regional level.

So far, twelve devolution deals have been agreed⁵. Whilst the specifics of these are all different, changing governance arrangements may mean new decision-making structures and different audiences for organisations that are seeking public funding in the future.

The Creative Industries Sector Deal between the UK Government and the Creative Industries Council was launched in 2021. It will bring at least £150 million of new investment to:

- Build sustainable creative industry 'clusters';
- Drive growth through innovation and R&D;
- Improve access to finance, export support and intellectual property protection; and
- Strengthening the talent pipeline to address skills needs and improve diversity.

This has resulted in the Creative Clusters Programme, the £20 million Cultural Development Fund and the £4 million Creative Scale-Up programme. The South East secured £1.275 million for Create South East, as part of the DCMS Create Growth Programme.

⁴ Build Back Better – Our Plan for Growth; HM Treasury; 2021

⁵ Cambridge & Peterborough; Cornwall; Greater Manchester; Liverpool City Region; London; North of Tyne; South Yorkshire; Tees Valley; West of England; West Midlands; West Yorkshire

2.3.2 SECEN Statement of Intent

The SECEN Statement of Intent commits partners to pledges that support the creative and cultural sectors under five themes:

Creative Clusters - This acknowledges the polycentric nature of the south east, with no primary urban centres. It recognises the gravitational pull of places that have clear identities. Supporting clusters enables entrepreneurs to plug into new markets and supply chains. There are clusters of creative workspaces, creative quarters and virtual clusters, which operate on-line. The type of interventions depend on the stage of development that the cluster is at: Some are well-established and large; others are emerging and small.

Place-making - Galleries, theatres, heritage buildings, festivals, events, public art, and repurposed buildings can create a sense of place, stimulate economic growth, and deliver social outcomes. Living alongside or participating in culture and creativity helps to make communities happier, more prosperous and safer. SECEN will work with local authority planners to maximise future opportunities for bespoke cultural ecosystems, building cultural vitality into new developments, enhancing local distinctiveness and assets.

Increasing Workspace - The sector is dominated by micro-businesses and freelancers, often working on a project by project basis in ad hoc teams. The creative sector needs access to specialist equipment and scalable workplaces. The types of space required is varied and can be highly specialised. There needs to be easy access to fit-for-purpose workspaces, including repurposing under-occupied privately or publicly owned buildings, and increasing supply of suitable workplaces to enable businesses to scale up and to support creative clusters.

Growing Cultural Tourism - The creative industries supports a year-round visitor offer by enhancing local distinctiveness. Workspace development reclaims disused buildings, enhances public realm and reinvigorates high streets. It generates experiential products such as festivals and exhibitions and manufactures artisan objects to support the visitor economy. SECEN will generate South East-wide itineraries and pro-actively market the region to the film industry.

Driving Innovation - Creative innovation involves collaboration with other sectors and with creatives working with academics and tech professionals. SECEN will support activities around creative technology and create an environment that supports the R&D process, where businesses can access the equipment, incubator labs, maker spaces and co-working spaces they need; where funding and business support encourages innovation; and where there are knowledge exchange opportunities.

2.3.3 Planning Policy

Planning policy is shaped by the National Planning Policy Framework (NPPF) which was updated in July 2021. The creative industries have a key role in delivering its overarching aim of achieving sustainable economic development through economic, social and environmental objectives. This is because, with the right cultural and social facilities, they can fulfil their role in creating strong, vibrant, inclusive and safe communities.

In many areas cultural venues have significant heritage value and are iconic symbols of local communities, but in some, they have lost their vibrancy and been allowed to fade. The National Design Guide⁶ states that culture is important in shaping a sense of place and identity and in fostering social interaction and inclusion, whilst well designed places are 'responsive to local history, culture and heritage'.

Planning policy in local areas is determined by Local Plans. Given the wider role that the creative industries have in local place-making, culture should be a key objective of these, with specific policies around protecting and supporting cultural facilities and public art, incorporating cultural provision as part of new developments, making creative use of spaces for meanwhile uses, and ensuring that there is sufficient flexible and affordable creative workspace.

⁶ The National Design Guide: Planning practice guidance for beautiful, enduring and successful places. Ministry of Housing, Communities & Local Government, Jan 2021. At: <https://www.gov.uk/government/publications/national-design-guide>

2.3.4 Creative Opportunity Zones

Creative Opportunity Zones will help build awareness of the role and value of the creative industries and cultural sector in local development, provide partners with a set of tools and guidance on how to nurture and grow the local creative and cultural sector, and introduce learning resources on what works and what doesn't. They will shine a light on best practice in the South East Region which will elevate the profile and status of the region as a place which 'gets culture'.

The core purpose of the Creative Opportunity Zone in the South East is to:

- Establish a new investment model for local creative economy development where the creative industries and cultural sector are championed for their role in driving inclusive growth, enhancing the quality of place and delivering positive spill over benefits.
- Measure the impact of interventions which prioritise creative industries and cultural sector development at a place- based level and as an action learning process which builds knowledge across the South East region.
- Support, through an evidence-based approach to innovation, sector development and creative place-making – giving partners (Local Authorities, the creative and cultural sector, investors, developers) proven tools which can be adapted to specific local contexts.
- Leverage investment into specific places – for culture and the creative industries and for other development priorities.
- Raise awareness of the role and profile of creative and cultural investment in other places.

2.4 Barriers to Growth

Supporting the development of the creative industries is a priority for many local authorities because of the wider benefits that they bring to local communities.

The fragmented nature of the sector, the preponderance of micro businesses and freelancers and their distinctive development needs mean that creative businesses face particular barriers to growth, which include:

- Difficulties in accessing finance and investment.
- Lack of affordable, accessible workspace and equipment.
- Public funding metrics that prioritise traditional job creation over other impacts.
- Difficulties in accessing talent and people with the right skills.
- Lack of specific and relevant business support.
- Lack of networks and partnerships, including access to universities for knowledge exchange and talent.

Some of these barriers are particularly acute for rural businesses and freelancers. Rural businesses have challenges around isolation (particularly if they are not in close proximity to other cultural assets, such as museums, theatres and cinemas), and poor quality digital infrastructure.

Freelancers make a significant contribution to local economies and communities. Many are portfolio workers, combining their creative activities with other work, or working on projects on an ad-hoc basis. Freelancers can struggle with work-life balance, can find it more difficult to be part of networks, have cashflow challenges associated with delayed payments and contract mission creep, and struggle to get access to legal and financial advice and skills training.

The sector has a high prevalence of companies which expand and contract on a regular basis and a preference for shared spaces and collaborative working, so available workspace must have the flexibility to accommodate this.

THE STRATEGIC FRAMEWORK

3. THE PLACE-BASED ANALYSIS

The Place-Based approach is a comparative analysis of creative industries' local need and opportunity within the South East. It complements the diverse evidence which already exists and should be used in combination with this.

The analysis brings together consistent evidence on the current scale and trajectory of the creative sector across the region's largest places, with the aim of enabling performance and opportunity to be benchmarked and compared.

3.1 The Methodology

The Strategic Framework's Place-Based methodology follows an evidence-led approach and identifies key criteria to guide investment. All 46 places in the South East with a population of over 20,000 people were selected. In population size, these ranged from Southend-on-Sea (183,125) to Faversham (20,105). Five smaller places were also selected, based on knowledge and experience of local creative activity⁷: Hailsham (18,194), Lewes (17,943), Broadstairs (14,979), Sheerness (13,418) and Newhaven (13,095). A total of 51 places in total were, therefore, analysed. There are eight locations in East Sussex, 24 locations in Kent & Medway, and 19 places in Greater Essex.

The Department for Culture, Media & Sport Standard Industry Classification (SIC) definition of the Creative Industries was used for the analysis. The full list of the sub-sectors used in the analysis is shown in Annex B.

The Place-Based approach is based on each place's Creative Intensity and Place Trajectory. This has the following components:

3.1.1 Creative Intensity

Each location was awarded a Creative Intensity score based on its ranks (out of 51) across four variables:

- a) Its share of South East creative jobs in 2019.
- b) Its Location Quotient (LQ) of creative jobs in 2019.
- c) Its share of South East creative businesses in 2019.
- d) Its Location Quotient creative businesses in 2019.

As an example, Canvey Island had a Creative Intensity rank of 54. Its components were: a = 13 (because had the 13th lowest share of SECEN creative jobs); b = 29 (because it had the 29th lowest Location Quotient for creative jobs); c = 8 (because it had the 8th lowest share of SECEN creative businesses; and d = 4 (because it had the 4th lowest Location Quotient for creative businesses). The highest possible creative intensity score was 204 and the lowest possible creative intensity score was 4. See Table C1 (Annex C).

⁷ All places have been defined for statistical analysis using a best fit 'MSOA' geography

3.1.2 Creative Trajectory

Each location was awarded a Creative Trajectory score based on its ranks (out of 51) across four variables:

- a) Its share of SECEN creative job growth between 2015 and 2019.
- b) Creative job specialisation (Location Quotient) change between 2015 and 2019.
- c) Its share of SECEN creative business growth between 2015 and 2019.
- d) Creative business specialisation (Location Quotient) change between 2015 and 2019.

As an example, Dover had a Creative Trajectory rank of 167. Its components were a = 47 (because had the 47th lowest share of SECEN creative jobs change between 2015 and 2019); b = 47 (because it had the 47th lowest Location Quotient change for creative jobs between 2015 and 2019); c = 32 (because it had the 32nd lowest share of SECEN creative business change between 2015 and 2019; and d = 41 (because it had the 41st lowest Location Quotient change for creative businesses). The highest possible creative intensity score was 204 and the lowest possible creative intensity score was 4. See Table C6 at Annex C.

The scores for each place were mapped onto a quadrant, based on the following:

- Lower creative intensity; Stronger place trajectory: Places where the score for creative intensity was low, but the score for creative trajectory was high.
- Higher creative intensity; Stronger place trajectory: Places where the score for creative intensity and the score for creative trajectory were both high.
- Lower creative intensity; Weaker place trajectory: Places where the score for creative intensity and the score for creative trajectory were both low.
- Higher creative intensity; Lower place trajectory: Places where the score for creative intensity was high, and the score for creative trajectory was low.

This forms the basis of the data-driven approach to the Strategic Framework and the likely interventions that will be needed, based on each place's position within it.

3.2 Caveats and Limitations

The efficacy of data-driven approaches depends on the quality and availability of data. As such, several caveats need to be considered.

3.2.1 Data Quality

The data is taken from the Business Register and Employment Survey (BRES) and UK Business Counts. These are credible, publicly available data sources, which are updated on an annual basis. However, the BRES is a survey, based on a sample size of around 85,000 businesses nationally (around 3% of the country's business population). It is used to draw inferences about the population of businesses in the UK. As the units of analysis get more specific, the sample gets smaller and the estimates are less accurate. This means that data at local and sub-sector level should be treated with some caution.

The data in the Strategic Framework is from 2015 to 2019 – data quickly becomes dated, so the Strategic Framework needs to be updated on a regular basis. The trajectory measure is based on historic data, rather than being future-focused, so it does not take into account planned future developments within local areas. Changes in the data could also be based on a single event in a single year, or they could be as a result of a gradual change in circumstances over several years. This is significant when considering trajectory. For example, there were 1,090 fewer people working in Wickford in 2019 than there were in 2015. However, a more in-depth analysis shows that the number of creative employees fell by 1,035 between 2015 and 2016 and by a further 295 between 2016 and 2017. However, since then the number has increased by 230. This suggests that if the data was analysed from 2017 onwards Wickford may be in a different part of the Quadrant.

At very local level, numbers are often small. For example, Broadstairs, is recorded as having 70 people working in 40 creative businesses. Small changes can, therefore, make a big proportionate difference. This is largely covered by the Analysis, which uses Location Quotients and contributions to the SECEN area to measure change, rather than the actual number of businesses and employees.

3.2.2 Breadth and Scope

While the Strategic Framework provides a grounding in understanding the local distribution of creative jobs and enterprise across the sub-region, the data only tells a small part of the story. More bespoke analysis of a broader range of data and insights, for example on local property market dynamics, on the local freelancer and homeworker economy, and local politics and strategic momentum, is needed to establish a full and nuanced understanding of local opportunity.

3.2.3 Using Ranks as a Measure

Ranking systems are very helpful for benchmarking, but they have limitations. A key limitation is the difference in the counts between different places in a rank. For example, there are 1,240 more people employed in the creative industries in Colchester (Ranked 1st) than there are in Brentwood, which is ranked five places below in 5th. However, there only 60 more people employed in the creative industries in Chatham & Rochester (ranked 18th) and Wickford, which is ranked five places below in 23rd. A simple ranking system that assumes equal difference between the ranked places may visually under-estimate the contribution of places with a larger number creative employees and/or businesses, and over-estimate the contribution of places with a smaller number of creative employees and/or businesses.

3.2.4 Spatial Selection

The Strategic Framework uses places that have a population size of 20,000 or more, with a small number of additional locations. From a data perspective, this is sensible, particularly as the focus is only on the creative industries. Using smaller locations or breaking down the creative industries would stretch the data too far. However, it means that key parts of the South East region's creative economy are excluded from the Strategic Framework. A quarter (24%) of all employed people and 31% of all self-employed people in the South East live in its rural areas⁸. The spatial analysis covers 34,385 creative jobs in the region out of a total of 55,000. This means that over a third (38%) of region's creative jobs are not covered in the analysis because they are in locations that have populations below the 20,000 threshold.

Many creative businesses operate in 'micro' clusters outside larger creative clusters and their contributions to the region's creative economy also need to be recognised and supported. Improving digital infrastructure has, arguably, made these rural locations more attractive than they previously were, whilst the growth of hybrid working means that it is easier for employees of larger organisations to work remotely, sometimes in rural areas.

3.2.5 Treatment of Freelancers

The Strategic Framework may not capture the full contribution of freelancers, project-based workers and portfolio workers, who are a key feature of the creative industries. In 2019, 34% of the creative industries workforce in the South East was made up of freelancers. The data that has been used for the Strategic Framework probably underestimates the size of the region's creative workforce and may not identify concentrations of local creative activity, where this mainly comprises freelancers.

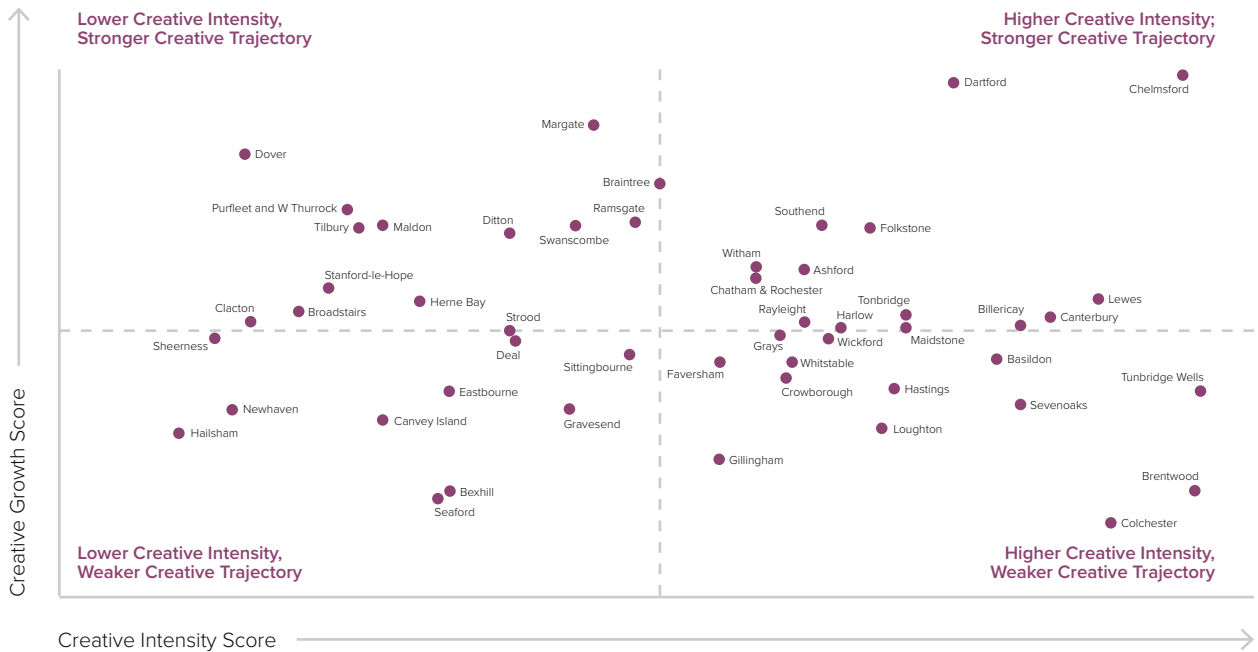
However, generally, there is a high correlation between the traditional employment figures and the size of these smaller creative clusters⁹. The few exceptions to this include Chatham, Eastbourne, and Ashford, where the creative ecosystem might be larger than the traditional data suggests.

⁸ South East Local Enterprise Partnership, Rural Strategy 2015 - 2021

⁹ Creative Industries Radar (2020)

3.3 The Creative Quadrant

Graphic 1: The Creative Quadrant.



A large number of locations are positioned around the horizontal line of the Quadrant, which may suggest that there are only small differences in creative growth scores between many places. The main outliers to this are Colchester, Brentwood, Seaford and Bexhill (all with low Creative Growth scores); and Chelmsford, Dartford, Margate, Dover and Braintree (all with high Creative Growth scores).

There is a wider distribution of Creative Intensity Scores, which may reflect the different role that the Creative Industries have in different locations. Chelmsford, Tunbridge Wells, Brentwood, Colchester and Lewes have high creative intensity scores, whilst Hailsham, Newhaven, Clacton and Dover have low Creative Intensity Scores.

Overall, there are few locations that sit firmly within one of the four elements of the quadrant. Exceptions to this are:

- Higher creative intensity; Stronger creative trajectory: Chelmsford and Dartford.
- Higher creative intensity; Weaker creative trajectory: Brentwood, Colchester and Loughton.
- Lower creative intensity; Stronger creative trajectory: Dover, Purfleet & Thurrock, Maldon and Tilbury.
- Lower creative intensity; Weaker creative trajectory: Hailsham, Seaford and Bexhill-on-Sea.

The position of all places should be the subject of further discussion. However, places that are firmly within one of the quadrants may find that the recommended actions in Graphic 2 (below) to be most relevant to their locations.

3.4 Using the Creative Quadrant

The Creative Quadrant is based on the data and method set out above. It is one way of trying to categorise places to inform decision-making and interventions to support creative businesses to grow. It should be used in combination with other local qualitative and quantitative intelligence and within the context of the caveats and limitations set out above.

Data often provides a mechanism to start conversations and prompt questions, and it can help to confirm or challenge perceptions and assumptions. It is worth questioning where each location sits within the quadrant:

- Does it seem to be in the right place within the quadrant?
- Are there particular local factors that explain or challenge its position, considering the caveats set out earlier?
- Are there planned developments or other factors that are likely to impact on the profile and trajectory of locations?
- What are the specific characteristics of the creative industries in a particular location, in relation to sub-sector specialisms, the presence of micro-clusters, innovation assets or infrastructure issues, for example?

This Strategic Framework sets out the types of intervention that could be most useful to focus on, based on the four elements of the Quadrant. In interpreting it for locations, it is important to note that most local areas do not fit firmly into any one of its four sections.

Graphic 2: Starter Guide.

<h2 style="color: #C0392B;">NURTURE</h2> <hr/> <p>Lower creative intensity and stronger creative trajectory places</p> <p>Place Characteristics</p> <ul style="list-style-type: none"> • Growing, but relatively small creative economy. • Recently emerged as creative hubs, due to their growth potential. • Likely to need public sector/institutional support growth. <p>Examples of Places</p> <p>Greater Essex</p> <ul style="list-style-type: none"> • Tilbury; Maldon; Purfleet & Thurrock; Stanford-le-Hope; Braintree; Clacton. <p>Kent & Medway</p> <ul style="list-style-type: none"> • Dover; Margate; Ditton; Swanscombe; Ramsgate; Strood; Broadstairs; Herne Bay. <p>East Sussex</p> <ul style="list-style-type: none"> • None. <p>Possible Interventions</p> <ul style="list-style-type: none"> • Leveraging the creative momentum for place-making. • Prioritising accessible public infrastructure to focus on a specific sub-sector. • Answering the challenges faced by new businesses and by SMEs, such as a lack of access to an affordable and flexible workspace or established training support. 	<h2 style="color: #C0392B;">SUSTAIN</h2> <hr/> <p>Higher creative intensity and stronger creative trajectory places</p> <p>Place Characteristics</p> <ul style="list-style-type: none"> • Growing and established creative economy. • Evidence of creative specialisation. • Some established local assets, such as skills/training support, suitable workspace, supply chain activity, clustering. <p>Examples of Places</p> <p>Greater Essex</p> <ul style="list-style-type: none"> • Billericay; Chelmsford; Harlow; Rayleigh; Southend; Witham. <p>Kent & Medway</p> <ul style="list-style-type: none"> • Ashford; Canterbury; Chatham & Rochester; Dartford; Folkestone; Maidstone; Tonbridge. <p>East Sussex</p> <ul style="list-style-type: none"> • Lewes. <p>Possible Interventions</p> <ul style="list-style-type: none"> • Support for sector leadership, networking and coordination. • Support for specific creative sub-sectors with a strong presence. • Attract further investment in existing activities and businesses. • Respond to specific challenges articulated by the (sub)sector.
<h2 style="color: #C0392B;">SEED</h2> <hr/> <p>Lower creative intensity and weaker creative trajectory places</p> <p>Place Characteristics</p> <ul style="list-style-type: none"> • An under developed creative economy, with a small proportion of creative industries employment. • Little evidence of recent growth, but could have small clusters with the potential to grow. <p>Examples of Places</p> <p>Greater Essex</p> <ul style="list-style-type: none"> • Canvey Island. <p>Kent & Medway</p> <ul style="list-style-type: none"> • Sheerness; Deal; Sittingbourne; Gravesend. <p>East Sussex</p> <ul style="list-style-type: none"> • Newhaven; Hailsham; Eastbourne; Bexhill-on-Sea; Seaford. <p>Possible Interventions</p> <ul style="list-style-type: none"> • Increase awareness of existing creative activities and support to access funding. • Leveraging public sector capacity including using underutilised assets and business support networks. • Creating suitable baseline conditions for the creative economy, such as providing affordable and flexible workspace, or improving education/skills. 	<h2 style="color: #C0392B;">MITIGATE & RESTORE</h2> <hr/> <p>Higher creative intensity and weaker creative trajectory places</p> <p>Place Characteristics</p> <ul style="list-style-type: none"> • A large creative economy, with a large proportion of creative industries employment • Little evidence of recent growth, but likely to have specialised clusters and sector networks that have encountered barriers to growth. <p>Examples of Places</p> <p>Greater Essex</p> <ul style="list-style-type: none"> • Grays; Wickford; Basildon; Colchester; Brentwood; Loughton. <p>Kent & Medway</p> <ul style="list-style-type: none"> • Royal Tunbridge Wells; Sevenoaks; Faversham; Gillingham; Whitstable. <p>East Sussex</p> <ul style="list-style-type: none"> • Crowborough; Hastings. <p>Possible Interventions</p> <ul style="list-style-type: none"> • Focused on specific creative sub-sectors with a strong presence. • Responding to a specific problem articulated by the (sub)sector, such lack of access to grow-on space, rising commercial rents, or limited availability of qualified workforce.

Creative clusters within the region are at different stages on their journey - from emerging locations to nationally recognised examples of growth, such as the Thames Estuary Production Corridor. Supporting place-based creative clusters acknowledges these differences, managing the South East as a poly-centric economic geography in which there are many hotspots: towns, rural and coastal areas come together in dynamic, place-based clusters.

4. A SUB-SECTOR ANALYSIS

This section considers sub-sector profiles and trajectories separately for East Sussex, Greater Essex and Kent & Medway, based on their Location Quotients in 2019 and changes in the number of people in employment within each between 2015 and 2019.

These have then been mapped onto a quadrant with the following:

- Higher growth; Higher presence: Where the percentage change of jobs has increased and the concentration of jobs is high.
- Higher growth; Lower presence: Where the percentage change of jobs has increased, but the concentration of jobs is low.
- Lower growth; Higher presence: Where the percentage change of jobs has decreased, but the concentration of jobs is high.
- Lower growth; Lower presence: Where the percentage change of jobs has decreased and the concentration of jobs is low.

The Strategic Framework creates a “Starter Guide” of potential interventions across larger geographies. When used in combination with the Place-Based Analysis, it can be tested and refined locally. The sub-sector data is shown at the larger geographical level because it would be stretched too far if it is shown at smaller geographies.

4.1 The South East’s Creative Economy

DCMS Sub-Sector	Total Jobs	% of Total Creative jobs	LQ vs Eng	2015-2019 Change (%)
Advertising & Marketing	4,530	8%	0.53	-4%
Architecture	4,025	7%	0.77	+21%
Crafts	375	1%	1.35	-12%
Design	3,750	7%	1.12	+38%
Film, TV, video, radio & photography	4,405	8%	0.48	+12%
IT, software & computer Services	23,970	44%	0.69	+12%
Museums, galleries & libraries	2,625	5%	0.8	-6%
Music, performing & visual arts	4,940	9%	0.71	+40%
Publishing	6,385	12%	1.00	-39%
TOTAL	55,005	100%	0.70	+2%

There are 55,005 creative jobs in the South East, nearly half (44%) of which are in the IT, Software & Computer Services sub-sector. The other creative jobs are distributed fairly evenly between Publishing (12%) Music, Performing & Visual Arts (9%); Film, TV, Video, Radio & Photography (8%); Architecture (7%); Advertising & Marketing (8%); Design (7%) and Museums, Galleries & Libraries (5%). There are only a very small number of people (375) working in the Crafts sub sector.

The Location Quotient (LQ) shows the level of concentration of jobs compared with England. Where it is above 1.0, there is a greater concentration; where it is below 1.0, there is a smaller concentration. Overall, the region has a low concentration of jobs in the creative industries (LQ 0.70). However, this may be the “London effect”, in which high concentrations in the capital mean that concentrations in every other region in England are low. Of the three sub-areas, only Greater Essex has a concentration of creative jobs that reflects the average for England.

The highest concentrations of creative activity are in Design (1.12); Publishing (1.00); and Crafts (1.35), although the small number of Crafts jobs, makes this less significant.

More detailed sub-sector analysis reveals clear employment concentrations in these specific industries:

- Publishing of consumer, business and professional journals and periodicals (2,500 jobs; LQ 1.26).
- Other publishing activities (2,000 jobs; LQ 1.54).
- Other photographic activities (not including portrait photography (600 jobs; LQ 1.39).
- Archive activities (300 jobs; LQ 1.62).

Overall, the number of creative jobs in the region increased by 2% between 2015 and 2019. Over the same period, the number of jobs increased by 11% across England as a whole.

The modest growth in creative industries employment masks significant differences between the sub-sectors within the region. The strongest proportionate growth is as follows: Music, Performing & Visual Arts (+40%); Architecture (+21%); Design (+38%); IT, Software & Computer Services (+12%); and Film, TV, Video & Photography (+12%). There is a decrease in the number of jobs in Crafts (-12%); Publishing (-39%); Advertising & Marketing (-4%); and Museums, Galleries & Libraries (-6%).

4.2 Cross Boundary Creative Initiatives

The Thames Estuary Production Corridor and Creative Estuary

The Thames Estuary Production Corridor was launched in 2017. It is a partnership between the Greater London Authority, the South East Local Enterprise Partnership and the South East Creative Economy Network. It aims to unite east London, the North Kent Coast and South Essex to create a world-class centre for creative and cultural production, supporting the rapid growth of the creative economy.

A series of large scale, state-of-the-art creative and cultural production centres across the Estuary is being developed, supported by strategic skills programmes.

It has the potential to create 50,000 jobs and generate £3.7 billion for the UK economy, becoming the UK's largest concentration of creative production. So far it has attracted £4.6 million of central government investment into the Creative Estuary programme. Over 200 partners have engaged in discussions, including local workspace providers, creative and cultural bodies and organisations, developers, higher and further education institutions, sector representatives, and public sector representatives from local authorities up to central government.

Since 2019, Creative Estuary has worked across geographic boundaries of the Thames Estuary in Kent and Essex. The value and impact of this joined-up approach and infrastructure growth to support the sector can be seen in the scale of recent government investment in Chatham through Levelling Up Fund 1 and Cultural Development Fund 3 and in Basildon's Creative Centre for Screen and Digital Immersive Technologies, also CDF 3 funded.

¹⁰ Source: Mid-Year Population Estimates; Office for National Statistics via NOMISWEB

4.3 East Sussex

4.3.1 East Sussex Profile Summary

In 2019, East Sussex had a resident population of 557,229¹⁰ – 13% of the South East region’s population. Of these, 55% live in the urban areas used for the analysis in the previous section. This leaves 45% of the population living in rural parts of the county.

A little over half (57% or 317,816) of the county’s residents are of working age – 12% of the South East region’s working age population. Across the whole economy, it had 184,000 jobs (11% of the region’s total) and 23,135 businesses (13% of the region’s total).

The largest urban centres in the county are:

- Hastings (92,661 residents).
- Eastbourne (72,084 residents).
- Bexhill-on-Sea (45,830 residents).
- Seaford (24,639 residents).
- Crowborough (22,212 residents).

There are 38 Mid Layer Super Output Areas within the towns used for the analysis in the previous section. Of these nine (24%) are within the top 20% most deprived in England and six of these are in Hastings, making it one of the most deprived parts of the South East region. Locations within the county have been the focus of significant national public sector investment in recent years, including: Towns Deal – Hastings, Eastbourne, Bexhill-on-Sea, Newhaven; Future High Streets Fund – Newhaven, Hastings; High Street Heritage Action Zone: Hastings; Levelling Up Fund: Newhaven, Eastbourne and Bexhill-on-Sea.

Key Further & Higher Education Institutions are: East Sussex College Group: Hastings, Eastbourne and Lewes; University of Brighton: Eastbourne (due to close in 2024) and Falmer, near Lewes; University of Sussex: Falmer, near Lewes.

¹⁰ Source: Mid-Year Population Estimates; Office for National Statistics via NOMISWEB

4.3.2 Creative Initiatives – Case Studies

Newhaven: Re- Imagining Newhaven

In 2019, Lewes District Council, East Sussex County Council, Locate East Sussex and the Newhaven Enterprise Zone joined forces to develop a step-by-step plan for Newhaven Town Centre and High Street. This led to securing £5 million of Future High Streets Fund funding for an integrated and strengthened town centre that brings new and diversified uses to serve business communities and provides for Newhaven’s growing creative community.

This includes creating new opportunities for local entrepreneurs in the Greater Brighton City Region’s fast-growing creative sector. Key planned interventions include: re-purposing a disused supermarket space, providing creative co-working spaces, small studios, meeting spaces, a café and meeting area; and converting the upper levels of the under-utilised Dacre Road car park into an “Urban Living Room” - a social and experiential meeting space.

Eastbourne: Black Robin Farm

Eastbourne Borough Council and Towner, Eastbourne have secured Levelling Up funding to deliver 750 sq.m of creative workspace, focused on craft and design, at Black Robin Farm, on the edge of the South Downs National Park.

The phased delivery will also include a new sculpture workshop, artist maker centre and learning spaces. It will create a new world-class cultural heritage attraction for Eastbourne and the Downland environment. Alongside providing new employment opportunities in nearby Eastbourne, Black Robin Farm will also contribute to a health and wellbeing agenda.

Hastings: Observer Building

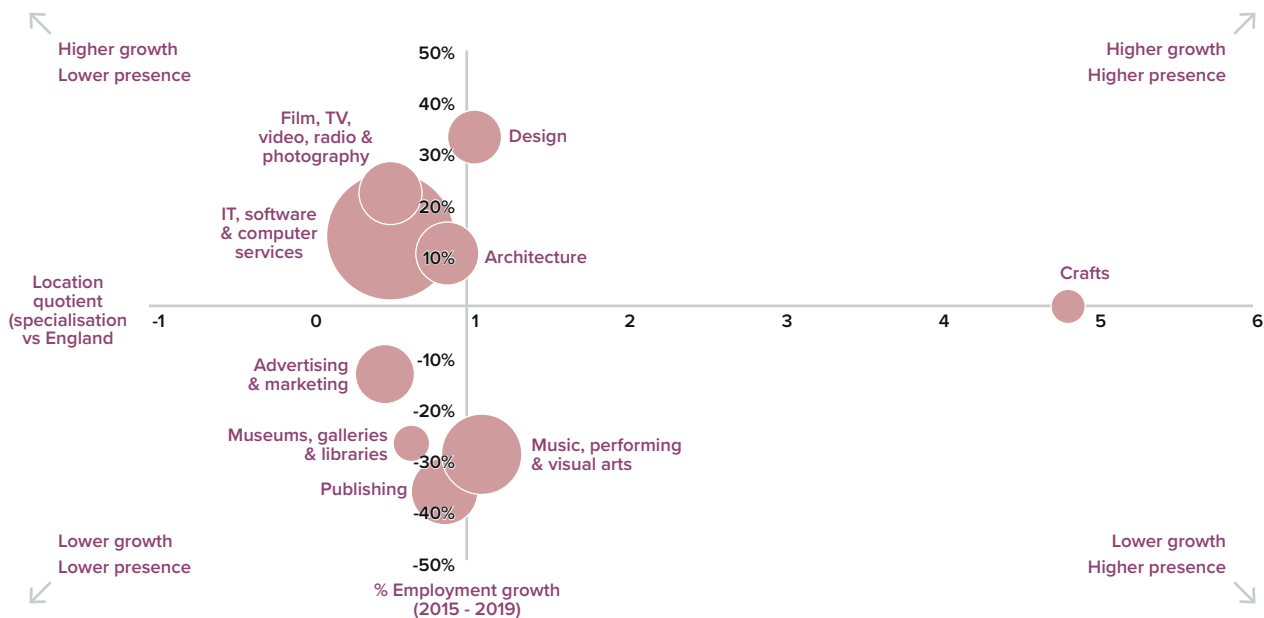
The Observer Building is a landmark property in Hastings that was built in 1924 to be the offices and print works for the local newspaper, the Hastings & St Leonards Observer.

After 10 years of sustained local community engagement, the building is to be converted into a new 4,000 sq.m mixed-use community facility, which will include two business incubator units and the Creative Digital Hub, one floor of low-cost co-working studios and offices, as well as supporting residential, leisure and amenity spaces.

The Observer Building forms a key part of a wider collaborative community-led regeneration effort in the White Rock neighbourhood, known as the Hastings Commons. It is an ecosystem of connected buildings and tenants with shared values and purpose.

4.3.3 Sector-Based Framework

Graphic 3: East Sussex Creative Sub-sector Jobs Size, Specialisation and Growth.



Note: Bubble size = number of jobs.

There are 6,000 creative jobs in East Sussex, 2,590 (43%) of which are in the locations used for the analysis in the previous section. This means that more than half (57%) of the county’s creative jobs are located in rural areas. Creative jobs in East Sussex account for 11% of the South East region’s total.

A third (36%) of the jobs are in IT, Software, & Computer Services; 15% are in the Music, Performing & Visual Arts; 10% are in Publishing; 9% are in Film, TV, Video, Radio & Photography; 9% are in Architecture; 8% are in Advertising & Marketing; 7% are in Design; 5% are in Museums, Galleries & Libraries; and 3% are in Crafts.

- **Higher growth; Higher presence:** Design.
- **Higher growth; Lower presence:** IT, Software & Computer Services; Film, TV, Radio & Photography; Architecture.
- **Lower growth; Higher presence:** Music, Performing Arts & Visual Arts; Crafts¹¹.
- **Lower growth; Lower presence:** Publishing, Advertising & Marketing; Museums; Galleries & Libraries.

Based on Location Quotients, Crafts is the only sub-sector that has a high concentration of jobs, compared with England, but this reflects a very small number of jobs. The lower concentration of jobs in some of the other sectors could be due to the distorting effect of London.

It is, therefore, important to use this analysis as a guide – some of the subsectors are quite close to having a 1.0 LQ, so their concentrations could be considered to broadly reflect the national profile. The clear exceptions to this are IT, Software & Computer Services; Film, TV, Video, Radio & Photography; and Advertising & Marketing, which all have quite low concentration profiles. Comparing the profile of subsectors with England (excluding London) might provide quite a different picture.

¹¹ Note: Only 150 jobs are recorded as Crafts jobs across East Sussex

More detailed sub-sector analysis reveals clear employment concentrations in the following specific industries, although the data starts to be stretched at this level of analysis:

- Other publishing activities (250 jobs; LQ 1.70).
- Cultural education (75 jobs; LQ 1.53).
- Performing arts (400 jobs; LQ 1.36).
- Operation of arts facilities (150 jobs; LQ 1.26).
- Motion picture projection activities (175 jobs; LQ 1.39).

There is some evidence of positive growth trajectories between 2015 and 2019 for some sub-sectors in East Sussex. This is most notably the case for IT, Software & Computer Services (+265 jobs); Design (+100 jobs); Film, Video, TV & Photography (+100 jobs); and Architecture (+50 jobs).

However, there is evidence of a negative growth trajectory in Publishing (-360 jobs); Music, Performing & Visual Arts (-355 jobs); Museums, Galleries & Libraries (-105 jobs); and Advertising & Marketing (-75 jobs).

4.3.4 What this Means for East Sussex

East Sussex forms a small part of the South East region economy and much of the creative activity takes place outside the locations that have been analysed for this Strategic Framework. Its rurality is an important feature of its economy and ensuring that support within urban centres links to their rural hinterlands is likely to be a key consideration for policy makers and investors.

East Sussex has clear concentrations of deprivation, particularly along the coastal strip and around Hastings. This means that it is likely to continue to attract public funding to support social equity agendas, but it may also mean that additional socio-economic issues need to be addressed in order to achieve inclusive economic growth. East Sussex has significant cultural assets and the role that the creative industries have in physically regenerating places and in promoting health and well-being is also likely to feature prominently.

Parts of East Sussex are quite isolated, with few dual carriageway roads and limited public transport in several rural areas. However, alongside this, it has outstanding green and blue infrastructure (sea, rivers etc.) which make it an attractive county. Parts of East Sussex have an unbalanced demographic profile, with a preponderance of post-working age residents.

This can lead to labour supply challenges, particularly in areas that are either unattractive to, or unaffordable for, younger people.

The creative industries have a major role in making places more vibrant. Providing affordable workspace, alongside affordable housing and excellent digital infrastructure, is likely to be a key factor in attracting and retaining talent in the county. Evidence from this analysis suggests that there was no change in employment in East Sussex' creative industries between 2015 and 2019.

¹² Source: Mid-Year Population Estimates; Office for National Statistics via NOMISWEB

4.4 Greater Essex

4.4.1 Greater Essex Profile Summary

In 2019, Greater Essex had a resident population of 1,846,655¹² – 43% of the South East region’s population. Of these, 64% live in the urban areas used for the analysis in the previous section. This leaves 36% of the population living in rural parts of the county.

A little under two-thirds (61% or 1,120,564) of the county’s residents are of working age – 44% of the South East region’s working age population. Across the whole economy, it had 720,000 jobs (44% of the region’s total) and 78,985 businesses (46% of the region’s total).

The largest urban centres in the county are:

- Southend-on-Sea (183,125 residents).
- Colchester (137,095 residents).
- Basildon (117,337 residents).
- Chelmsford (99,302 residents).
- Harlow (87,067 residents).
- Rayleigh/South Benfleet/Thundersley (86,124 residents).
- Grays (59,974 residents).
- Clacton-on-Sea (53,768 residents).

There are 131 Mid Layer Super Output Areas within the towns used for the analysis in the previous section. Of these, 16 (12%) are within the top 20% most deprived in England, and six of these are in Basildon, four are in Clacton-on-Sea and three are in Southend-on-Sea. Locations within the county have been the focus of significant national public sector investment in recent years, including: Towns Deal – Colchester, Harlow, Grays, Tilbury; Levelling Up Fund – Clacton-on-Sea, Harlow, Colchester, Southend-on-Sea; Creative People & Places: Basildon; Thurrock.

Key Further & Higher Education Institutions are:
Colchester Institute: Colchester; University of Essex: Colchester, Southend-on-Sea; Writtle University College: Writtle (near Chelmsford); East 15 Active School: Loughton, Southend-on-Sea; South East Essex College: Basildon, Southend-on-Sea, Thurrock.

4.4.2 Creative Initiatives – Case Studies

Purfleet: High House Production Park Expansion

The 14-acre High House Production Park Expansion site is a campus for creative and cultural industries, located in Purfleet, at the heart of the Thames Estuary Production Corridor. It is a collaboration between the Royal Opera House, Creative and Cultural Skills, Arts Council England, Government and Thurrock Council.

A refreshed masterplan will focus on providing affordable creative workspace and building a sustainable community of creative entrepreneurs on site as the partners develop the site to that it builds a community, and connects to local and regional diverse communities. It will also link to a state of the art film and TV studio facility and related creative industry hub at Purfleet-on-Thames.

Colchester: Old Bus Depot

At least 12 digital and creative workspaces will be created over four floors inside the Old Bus depot in Queen Street. It is a project led by Colchester Council with £4.7 million support from the Towns Fund. The aim is to diversify Colchester town centre and to build on the 1,100 sq.m of creative and co-working space provided by SPACE Colchester. The new workspaces will meet the needs of the growing number of digital creative businesses in the city and is expected to act as a catalyst to support a thriving local cultural sector.

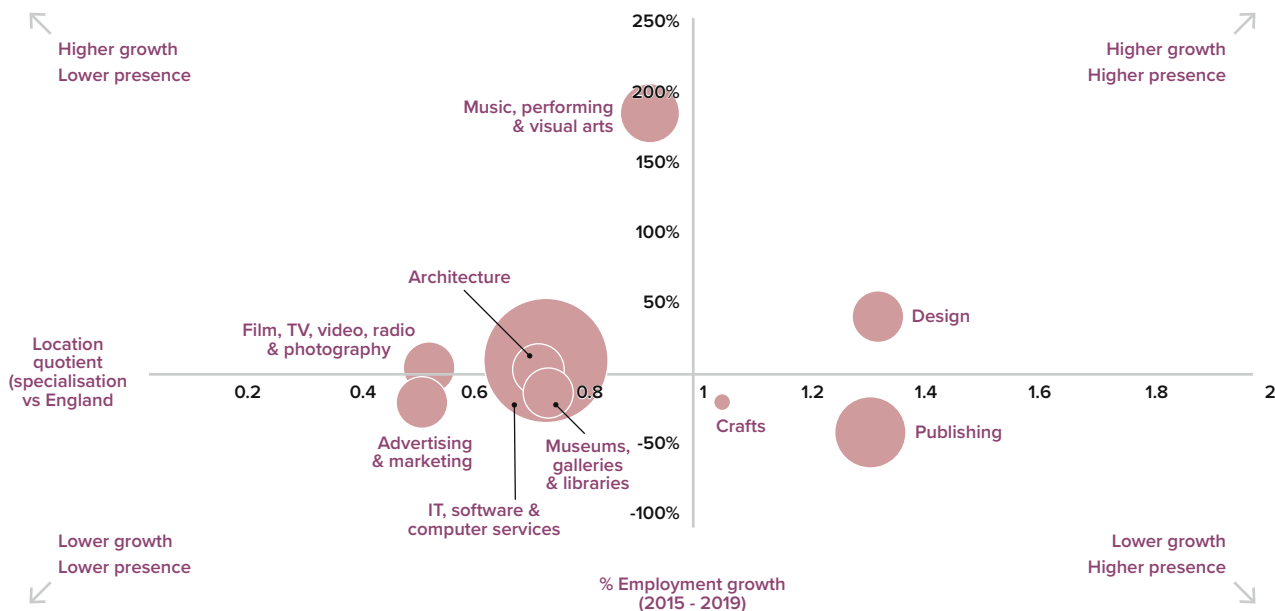
Basildon: Open Lab

Open Lab is part of the BasildON “Creative People and Places” programme. It forms part of an 8-year programme of projects and partnerships, providing a roadmap for stakeholders to incrementally grow cultural activation and attract creative enterprise.

There is currently an over-provision of retail space and an under-provision of other uses such as culture, leisure and food and drink in Basildon town centre. New uses are being seeded, including moves towards a “tech town redux”, focused on pulling digital uses into the town centre, building on technology, industrial and cultural activity currently on its outskirts.

4.4.3 Sector-Based Framework

Graphic 4: Greater Essex Creative Sub-Sector Jobs Size, Specialisation and Growth.



Note: Bubble size = number of jobs.

There are 27,655 creative jobs in Greater Essex, 18,975 (69%) of which are in the locations used for the analysis in the previous section. Creative jobs in Greater Essex account for 50% of the South East region’s total. It contributes more in terms of creative jobs than its population share would suggest.

Four out of ten (43%) of the jobs are in IT, Software, & Computer Services; 11% are in the Music, Performing & Visual Arts; 14% are in Publishing; 8% are in Film, TV, Video, Radio & Photography; 6% are in Architecture; 7% are in Advertising & Marketing; 7% are in Design; and 4% are in Museums, Galleries & Libraries; and 0.5% are in Crafts.

- **Higher growth; Higher presence:** Design.
- **Higher growth; Lower presence:** Music, Performing & Visual Arts; IT, Software & Computer Services; Film, TV, Radio & Photography; Architecture.
- **Lower growth; Higher presence:** Publishing; Crafts¹³.
- **Lower growth; Lower presence:** Advertising & Marketing; Museums; Galleries & Libraries.

Based on Location Quotients, three subsectors have a high concentration of jobs, compared with England: Design (1.37); Publishing (1.32); and Crafts (1.01). The close access that several parts of Greater Essex has to London may mean that it benefits from higher concentrations of creative jobs than many areas that are located further away from the capital.

Music, Performing & Visual Arts (LQ 0.95) has an LQ close to 1.0 LQ, which means that it is broadly representative of its national profile.

¹³ Note: Only 125 jobs are recorded as Crafts jobs across Greater Essex

More detailed sub-sector analysis reveals clear employment concentrations in the following specific industries, although the data starts to be stretched at this level of analysis:

- Other publishing activities (1,540 jobs; LQ 2.34).
- Cultural education (265 jobs; LQ 1.38).
- Specialised design activities (2,025 jobs; LQ 1.37).
- Portrait photographic activities (235 jobs; LQ 2.45).
- Film Processing (110 jobs; LQ 1.34).
- Other photographic activities (425 jobs; LQ 2.22).
- Support activities to the performing arts (430 jobs; LQ 1.74).
- Archive activities (130 jobs; LQ 1.58).

There was very strong employment growth trajectory in the Music, Performing & Visual Arts sub sector between 2015 and 2019, in which the number of jobs increased by +1,895 (+182%). The most significant increase occurred between 2017 and 2018. There was also an increase in the number of jobs in Design (+585) between 2015 and 2019. However, this masks a significant reduction of -850 between 2018 and 2019. There were 1,010 more jobs in the IT, Software & Computer Services in 2019 than there had been in 2015, but this also masks a reduction since 2017.

There is also evidence of a negative growth trajectory in Publishing (-2,280 jobs); and Advertising & Marketing (-425 jobs).

4.4.4 What this Means for Greater Essex

Greater Essex forms a major part of the South East region economy. It has the largest urban centres and the most creative jobs. Although some activity takes place outside the urban locations set out in this Strategic Framework, most of it takes place within them. Whilst still important, rurality may be less of an issue to Greater Essex than it is to East Sussex, for example.

Much of Greater Essex is close and easily accessible to London. This could be double-edged. Whilst there are risks of talent loss to the capital, there are also relocation advantages, both in terms of businesses and residents, who are looking for good quality and more affordable premises outside the capital.

Analysis of the employment data suggests that there could have been quite a shift in the structure of the creative industries in Greater Essex between 2015 and 2019. Overall employment growth was modest (+1%) compared with England (+11%) over the period. However, within this the significant growth in Music, Performance and Visual Arts and major loss in Publishing, which may need to be explored further.

Positioning its places as attractive alternative to London for creative professionals is likely to be a key driver for Greater Essex. This will extend beyond the availability of suitable workspaces however. There needs to be a strong creative eco-system, which includes a good supply of skilled labour and places that are attractive for people to want to live and work within.

Like most places, there are clear areas of deprivation that are mainly, although by no means exclusively, located in the coastal areas of Greater Essex. These places are likely to continue to be the focus of public investment for reasons of equity, whilst major projects like the Thames Estuary Production Corridor, provide a good example of how cross border collaborations can raise the profile of the area and provide a catalyst for future investment in the creative economy.

4.5 Kent & Medway

4.5.1 Kent & Medway Profile Summary

In 2019, Kent & Medway had a resident population of 1,860,111¹⁴ – 44% of the South East region’s population. Of these, 64% live in the urban areas used for the analysis in the previous section. This leaves 36% of the population living in rural parts of the county.

A little under two-thirds (61% or 1,129,203) of the county’s residents are of working age – 44% of the South East region’s working age population. Across the whole economy, it had 722,000 jobs (44% of the region’s total) and 71,435 businesses (41% of the region’s total).

The largest urban centres in the county are:

- Gillingham (117,448 residents).
- Maidstone (109,142 residents).
- Gravesend & Northfleet (86,738 residents).
- Chatham & Rochester (78,955 residents).
- Ashford (74,687 residents).
- Canterbury (62,365 residents).
- Sittingbourne (61,508 residents).
- Dartford (57,056 residents).
- Folkestone (53,754 residents).
- Margate (52,119 residents).

There are 136 Mid Layer Super Output Areas within the towns used for the analysis in the previous section. Of these, 29 (21%) are within the top 20% most deprived in England, and four of these are in Margate, four are in Gillingham, three are in Folkestone, three are in Dover, and three are in Chatham & Rochester,

Locations within the county have been the focus of significant national public sector investment in recent years, including: Towns Deal – Margate; Future High Streets Fund: Dover, Chatham, Ramsgate; Levelling Up Fund: Canterbury, Dover, Sheerness, Chatham, Ramsgate, Margate; Creative People & Places Fund: Swale & Medway (Chatham, Rochester, Gillingham, Sittingbourne, Faversham).

Key Further & Higher Education Institutions are:
University of Kent: Chatham, Canterbury, University of the Creative Arts: Canterbury, Rochester; University of Greenwich: Gillingham; Canterbury Christchurch University: Canterbury, Chatham, Royal Tunbridge Wells; University Centre¹⁵: Folkestone; Mid Kent College: Gillingham, Maidstone; Hadlow College: Tonbridge; North Kent College: Dartford, Gravesend, Tonbridge; East Kent College: Canterbury, Broadstairs.

¹⁴ Source: Mid-Year Population Estimates; Office for National Statistics via NOMISWEB

¹⁵ University Centre is an amalgam of the creative arts departments of the University of Greenwich and Canterbury Christ Church University

4.5.2 Creative Initiatives – Case Studies

Ashford: International Film Studios

This is a £250 million film studio opportunity site. It includes 18,500 sq.m of world class film studios, supporting ancillary space, including modern production offices, warehouse, storage and mills stores.

There are plans for a further 2,500 sq.m of media space, designed for SME's and fledging freelancers, with higher education partnerships. It is expected to provide full film sector needs, including on-site services, hotel, serviced apartments and conference facilities.

Margate: Creative Land Trust

A Creative Land Trust (CLT) will take control of clustered properties and ensure that there is the supply of the right types of spaces for creative activity, education and outreach, to thrive and grow. The CLT will provide safeguarded affordable workspace with high-quality digital connectivity, free enterprise space for young people and more.

This will repurpose long-term vacant buildings and bring new life to the town centre - driving footfall towards Margate's high street, benefiting surrounding businesses as well as those directly involved in the intervention. It will further establish Margate as a prominent creative production hub, bringing opportunities for employment, diversification, innovation and inclusion.

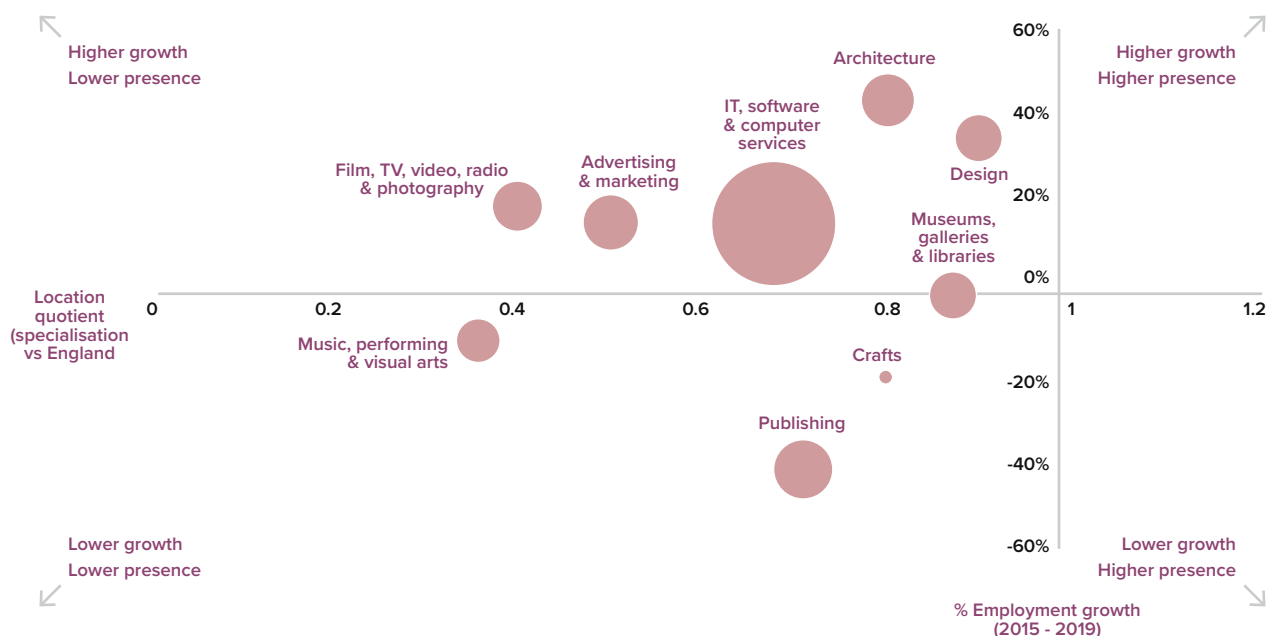
Ebbsfleet: Cultural Co-Location Pilots

Ebbsfleet Development Corporation (EDC) is piloting cultural co-location projects, which demonstrate new practice in the role of culture in planning and placemaking, through co-locating cultural facilities within planned civic infrastructure in different development scenarios.

EDC will bring forward the vision of a mixed use development within a 21st Century Garden City in Ebbsfleet, North Kent. New infrastructure includes specialist beacon facilities that serve creative practices. Sites across Whitecliffe and Northfleet riverside have been explored through a feasibility phase. Various buildings will be delivered and adapted to support creative activity.

4.5.3 Sector-Based Framework

Graphic 5: Kent & Medway Creative Sub-sector Jobs Size, Specialisation and Growth.



Note: Bubble size = number of jobs.

There are 21,370 creative jobs in Kent & Medway, 12,820 (60%) of which are in the locations used for the analysis in the previous section. Creative jobs in Kent & Medway account for 39% of the South East region's total.

Nearly half (47%) of the jobs are in IT, Software, & Computer Services; 5% are in the Music, Performing & Visual Arts; 9% are in Publishing; 8% are in Film, TV, Video, Radio & Photography; 9% are in Architecture; 10% are in Advertising & Marketing; 6% are in Design; and 6% are in Museums, Galleries & Libraries; and 0.5% are in Crafts.

- **Higher growth; Higher presence:** None.
- **Higher growth; Lower presence:** Design; IT, Software & Computer Services; Film, TV, Radio & Photography; Advertising & Marketing; Architecture.
- **Lower growth; Higher presence:** None.
- **Lower growth; Lower presence:** Publishing; Crafts¹⁶; Music, Performing & Visual Arts. Museums; Galleries & Libraries

Based on Location Quotients, no sub-sector has a high concentration of jobs, compared with England. The highest employment concentration is in Design (LQ 0.89), followed by Museums, Galleries & Libraries (LQ 0.87); Crafts (LQ 0.81); and Architecture (LQ 0.80); Job concentrations are particularly low in Film, TV, Video, Radio & Photography (LQ 0.41); Music, Performance & Visual Arts (LQ 0.37); and Advertising & Marketing (LQ 0.54).

¹⁶ Note: Only 100 jobs are recorded as Crafts jobs across Kent & Medway

More detailed sub-sector analysis reveals clear employment concentrations in the following specific industries, although the data starts to be stretched at this level of analysis:

- Motion picture & projection activities (550 jobs; LQ 1.11).
- Publishing of consumer, business & professional journals & periodicals (930 jobs; LQ 1.06).
- Archive activities (110 jobs; LQ 1.34).
- Library activities (725 jobs; LQ 1.10).

There is some evidence of positive growth trajectories between 2015 and 2019 for some sub-sectors in Kent & Medway. This is most notably the case for IT, Software & Computer Services (+1,365 jobs); Architecture (+575 jobs); Design (+350 jobs); Advertising & Marketing (+290); and Film, Video, TV & Photography (+280 jobs). However, there is evidence of a negative growth trajectory, most notably in Publishing (-1,410 jobs); Music, Performing & Visual Arts (-140 jobs).

4.5.4 What this Means for Kent & Medway

Kent & Medway is, geographically and in terms of population, a large county. It has few major centres outside the Medway towns; it has established culture centres, such as Canterbury, Tunbridge Wells and Whitstable; and places like Margate and Folkestone are developing strong cultural identities.

Several of Kent & Medway's towns along its extensive coastlines have received central government funding, reflecting their socio-economic challenges. These are aimed at supporting them to adopt stronger identities, often based on culture and creativity; to improve social and community conditions; and to support sustainable economic growth.

Whilst its population is similar to that of Greater Essex (and much larger than East Sussex), its share of creative jobs is less than might be expected. Whilst small areas have developed specialisms, these are more difficult to see at a county level, when measured in terms of jobs. Nevertheless, the evidence from this analysis, suggests a modest growth trajectory across different sub-sectors, perhaps partly as a result of Kent & Medway being a good relocation option out of London. Overall creative industries' job growth (+6%) was below that of England (+11%) between 2015 and 2019. This included a significant reduction in Publishing employment, but

increases in Architecture, Design and Film, TV, Video, Radio & Photography.

Four in ten of the county's creative jobs are not in locations that are included in the Spatial Analysis (see Section 3). This is a lower proportion than in East Sussex, but it still means that much of the county's creativity occurs in the rural parts of the county. Creative initiatives in urban centres will need to ensure that they serve their rural hinterlands and further work may be needed to better understand and respond to the needs of creative businesses in rural settings.

5. USING THE STRATEGIC FRAMEWORK AND MAKING THE CASE FOR INVESTMENT

This section provides guidance on using the Framework and accessing investment. It focuses mainly on public funding, setting out the main approaches that government departments and agencies use to appraise projects for public investment. It provides a brief explanation of the key principles that are used in appraisals and provides links to useful resources for further information. It also provides guidance on approaches to engage with private sector investors.

5.1 Strategic Framework Priorities and Outcomes

Projects should support SECEN and other local cultural priorities. Projects should be designed to deliver the outcomes that are set out below under each priority below:

Priority 1: Stimulating Economic Growth

- Outcome 1.1* Providing creative open workspace to meet demand/need.
- Outcome 1.2* Enabling clustering of similar businesses to increase productivity and stimulate innovation.
- Outcome 1.3* Supporting local supply chains.

Priority 2: Enabling Place-Making

- Outcome 2.1* Creating a distinctive sense of place.
- Outcome 2.2* Stimulating regeneration by filling vacant or under used buildings, or enabling development.
- Outcome 2.3* Preserving local/regional culture and support the visitor economy.

Priority 3: Generating Social Value

- Outcome 3.1* Improving skills and education opportunities for young people and disadvantaged adults.
- Outcome 3.2* Fostering links between cultural institutions, anchor businesses and/or higher education institutions.
- Outcome 3.3* Enabling the creative sector to provide new models of provision.
- Outcome 3.4* Using the creative sector to promote community engagement and reduce social isolation.

5.2 Using the Strategic Framework

The Strategic Framework can be used to help to prioritise projects, using the following approach:

1	Headline Priority ▼	<p>Defining a distinct purpose in East Sussex, Kent & Medway and Greater Essex respectively, which can support the scaling of the creative economy locally and regionally.</p> <p><i>You should:</i> Consider how local advocacy and activity can, with regional coordination and convening, target specific opportunities in response.</p>
2	Places Trajectory ▼	<p>Defining observations on places' trajectory from the evidence base.</p> <p><i>You should:</i> Identify your place in the "Place Framework" (Graphic 1 on Page 18) - or best fit comparison - and consider how it relates to the response "Starter Guide" (Graphic 2 on Page 16).</p>
3	Strengths and Opportunities ▼	<p>Defining what types of creative workspace would be most needed based on identified factors, including specialisation and growth snapshots that are provided to demonstrate sub-sector differences.</p> <p><i>You should:</i> Consider how investment can create stability and/ or respond to changing sector needs.</p>
4	Sector Priorities, Supply and Demand ▼	<p>Defining what types of creative workspace would be most needed based on identified factors, including specialisation and growth snapshots that are provided to demonstrate sub-sector differences.</p> <p><i>You should:</i> Consider how investment can create stability and/ or respond to changing sector needs.</p>
5	Project Pipeline Case Studies	<p>Demonstrating forthcoming creative workspace that is responding to the above factors at three scales:</p> <ul style="list-style-type: none"> ● 'Growth Engines' have the potential to be transformational in supporting the development of the sector and propel regional change. ● 'Place Drivers' generate a critical mass of sector activity that has a sub-regional impact, including on surrounding communities. ● 'Local Starters' support the development of creative cultural and production activities in distinct places. <p><i>You should:</i> Consider good practice lessons and how to complement these pipeline creative workspaces.</p>

5.3 Project Testing

Once projects have been defined, business cases need to be developed to support funding applications. They should be proportionate to the level of investment. Larger projects will face greater scrutiny, so more robust evidence will be needed. A process of project stress testing should consider the following:

1. Does the project align with strategic cultural goals? These may include preserving promoting cultural exchange, fostering creativity and innovation, or enhancing community engagement.
2. Is there evidence of good community consultation? What are the community's needs and preferences?
3. Is the project viable and deliverable? Consider the feasibility of each project in terms of available resources, capacity, and timeline.
4. Is there a clear Theory of Change? This should provide coherent link between inputs, outputs, outcomes and impacts?
5. What are the potential impacts and are they credible? Assess the potential impact of each project in terms of its ability to achieve the identified cultural goals, meet community needs and deliver value for money?
6. Is there a clear rationale for public investment? Why can't the project be delivered by the market? What is the market failure?
7. Does the project deliver value for money? What are the economic benefits? Are they credible and based on sound evidence? Have they considered 'additionality'?
8. How does the project support diversity and inclusion? Consider the diversity and inclusivity of each project, ensuring that all members of the community are represented and can benefit, focusing particularly on groups with protected characteristics.
9. What are the project risks? These could be financial, operational, reputational and legal risks.

5.4 Developing Business Cases

Public funds are approved on the basis of robust business cases. The level of detail should reflect the level of funding that is sought. HM Treasury and several other government departments and agencies recommend using the Five Case Model to develop business cases. It provides a logical and coherent approach to developing project proposals.

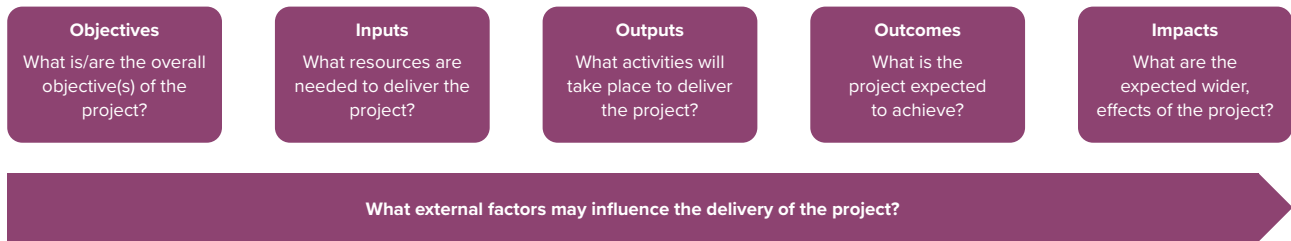
Not all funders will use the Five Case Model, but it is likely that much of the information that is asked for will be based on it, to some extent. The Five Case Model has the following elements:

Strategic Case

This sets the rationale for the project. What is the challenge/opportunity? Why can't the market deliver it? How does it align with strategic priorities? Is there stakeholder/community support for the project? Market failure is an important concept and needs to be considered in business cases. Public money is for public good. Lack of affordability IS NOT a market failure. Examples of market failure include:

- Externalities – Where the benefits of the investment do not accrue proportionally to investors. The creative industries may be a good example of this, in terms of the wider benefits that they provide in terms of place-making, economic growth and social value.
- Equity - There are strong equity arguments for public investment, much of which are around targeting resources to people and places that are most in need. SMEs and, in particular, freelancers, are known to find it more difficult to access finance and to have other challenges that larger businesses don't face, for example. This is an equity issue.
- Merit Good - Public investment can be used for reasons of public good. Examples of this could be renovation or refurbishment of heritage assets that have national intrinsic value; interventions that improve social engagement, reduce isolation and improve mental health could also be seen as merit good. The crucial concept is to think about what the public benefits are of projects that cannot be delivered through market mechanisms.

The strategic case should be based on well-sourced and credible evidence and there should be a clear rationale for why a particular project has been chosen over other alternatives. It is a good idea to include a Theory of Change in the strategic case.



The strategic case should also consider how the project addresses social value and contributes to environmental sustainability.

Economic Case

This is the value for money section. It compares the benefits with the costs and establishes whether it is good, acceptable or poor value for money. It is concerned with economic values, not just financial costs and revenues. It can be quite technical, but there are some useful economic terms to be aware of:

- Present value - The costs and benefits that occur in the future are discounted back to a price base year.
- Optimism bias - People commonly under-estimate the costs of capital projects, so Optimism Bias is added to the base costs, depending on risk factors and project dependencies and constraints.
- Additionality – Some benefits will not go to the intended beneficiaries or spatial area (leakage); others may result in fewer benefits elsewhere (displacement); and some of the benefits would accrue anyway, without the intervention (deadweight). Some of the benefits may result in additional indirect or induced impacts (multiplier effects). These create the difference between gross and net impacts and it is the net impacts that are important in the economic case.
- Monetised and non-monetised benefits - Where possible, benefits should be monetised using credible unit values. Some benefits can be difficult to monetise, but they can be quantified. Other benefits cannot easily be monetised or quantified. All potential benefits should be assessed as part of the economic case.

The economic case should include capital and operational costs and benefits and should compare the preferred option with a Do Nothing or Business As Usual option. It is a good idea to conduct sensitivity tests to see what would happen if costs increased or benefits were less than expected. Over-claiming is common in business cases, often because of over-optimistic net benefits and exaggerated attribution. It should be avoided because it undermines the credibility of business cases.

Commercial Case

This is the procurement section. How will the services be procured? Are there the skills and expertise in the market to deliver what is required at the price and within the constraints that are being proposed? How will risk be allocated between different organisations involved in delivering the project? Is there a clear timetable with milestones and expected outputs? What will the contractual arrangements be, including the charging mechanisms? How will the project deal with changed organisational or external circumstances?

Financial Case

This section considers the affordability of the project. It should be based on credible costs and revenues and include a cashflow forecast. Is there a viability gap that cannot be funded through the market? If so, what is it and can the project be re-engineered in a way to make it viable without public sector investment? How will the project be funded and when will the income be received?

What are the finances of the proposing organisation and are the financial risks acceptable? The financial case should include non-recoverable VAT, Section 106/Community Infrastructure Levy payments, where appropriate; and include realistic inflation, contingency, overhead and profits (OH&P) and professional fee allowances. Financial risks should be stated clearly.

Management Case

This section ensures that the right delivery, monitoring and evaluation systems are in place. How will the project be managed? What will the reporting arrangements be? Are the right skills and expertise in place to ensure that the project is delivered successfully? Will there be independent assurance? What are the arrangements for managing change or conflict.

It should include a full risk register (including financial risks) and describe the measures that will be put in place to mitigate the identified risks. There should also be a clear monitoring and evaluation framework.

Demonstrating that the preferred option can be successfully delivered requires evidence that the scheme is being managed in accordance with best practice, subjected to independent assurance, and that the necessary arrangements are in place for change and contract management, benefits realisation and risk management.

5.5 Engaging with Private Sector Investors

Where projects wish to engage with, or secure the support of, private sector funders or investors, the following is a helpful guide to consider:

- 1. Clearly define the project and its objectives:** This will help potential private sector partners understand the purpose and scope of the project, and evaluate whether they are interested in getting involved.
- 2. Identify potential partners:** Research and identify potential private sector partners that have an interest in the creative industries and are aligned with the project's aims and objectives. This could include businesses, investors and industry associations.
- 3. Build relationships:** Establish relationships with potential private sector partners through networking events, meetings, or other opportunities. This will help develop an understanding of their interests and concerns, and allow project's to tailor a pitch accordingly.
- 4. Create a value proposition:** Develop a compelling value proposition that outlines the benefits of the project for the private sector partner. This could include increased brand visibility, new market opportunities or access to talent.
- 5. Develop a strong proposal:** Create a strong proposal that outlines the project's goals, timeline, budget, and expected outcomes. Highlight the benefits for the private sector partner and provide clear and concise information.
- 6. Negotiate terms:** Once you have identified a potential partner and they have expressed interest, negotiate the terms of the partnership. This could include financial contributions, in-kind support, or other resources.
- 7. Monitor and evaluate:** Once the partnership is established, monitor and evaluate the progress of the project to ensure that it is meeting its objectives and delivering value for all parties involved. This will help to build trust and ensure the long-term success of the partnership.

6. PRACTICAL STEPS FOR LOCAL AUTHORITIES IN USING THE STRATEGIC FRAMEWORK

This section provides practical steps for Local Authorities in how to support their creative industries. In particular, it focuses on developing planning policies; establishing governance structures and maintaining collaborative partnerships; and it provides links to additional resources.

The Strategic Framework provides a starting point for identifying the right types of interventions to support the growth of the creative industries within the region, and its constituent parts, based on SECEN's investment priorities: Stimulating Growth; Enabling Place-making and Generating Social Value. It should be used alongside other actions that are set out below.

6.1 Planning for the Creative Industries

The SECEN Statement of Intent sets out the region's approach to supporting and growing creative people across the South East. But this can only happen with the support of its constituent local authorities and the engagement of Local Planning Authorities in developing and promoting the right infrastructure.

The visibility of cultural infrastructure makes culture a strategic priority in planning policy. A series of practical steps can be taken by Local Authorities and their partners to develop the creative industries locally¹⁷.

Understand the Cultural Eco-system

This Strategic Framework and the spatial and sub-sector analyses within it provide a starting point for localities to understand where they sit within the regional creative eco-system, but a greater depth of knowledge is needed at a local level to ensure that the right interventions are made to support the sector's growth.

Understand Context

Provision of workspace needs to be considered within a wider context. Factors, such as proximity to good transport links and residential developments, affordability and flexibility, digital infrastructure and access to a good supply of labour and knowledge and learning provision can be key considerations in deciding the most appropriate locations for creative workspaces.

Undertake a Cultural Audit and Develop a Strategy and Investment Plan

An audit will identify strengths, weaknesses, opportunities and threats. This could be supplemented by undertaking a study of the economic and social impacts of culture and the creative industries in local areas. These will inform a cultural strategy, underpinned by cultural investment priorities, which are needed to develop a supportive planning policy.

Establish Boards, Networks and Partnerships

Support and/or develop cultural networks through place-based partnerships and boards with representatives from all sections of the creative eco-system. This will ensure that cultural infrastructure schemes have wide support.

Boards should have clear terms of reference, and governance and accountability structures and represent the right spatial area, which may transcend Local Authority boundaries. Boards can be strategic to shape the development of the sector; and practical by providing opportunities to co-design projects. They can act as a consultation focal point and they can oversee business case development, investor support and help to create a common voice for the sector at local level.

Local partnerships and boards should be linked to wider networks across the South East to improve knowledge exchange, collaboration and coordination.

Develop Supplementary Planning Documents to Support the Creative Industries

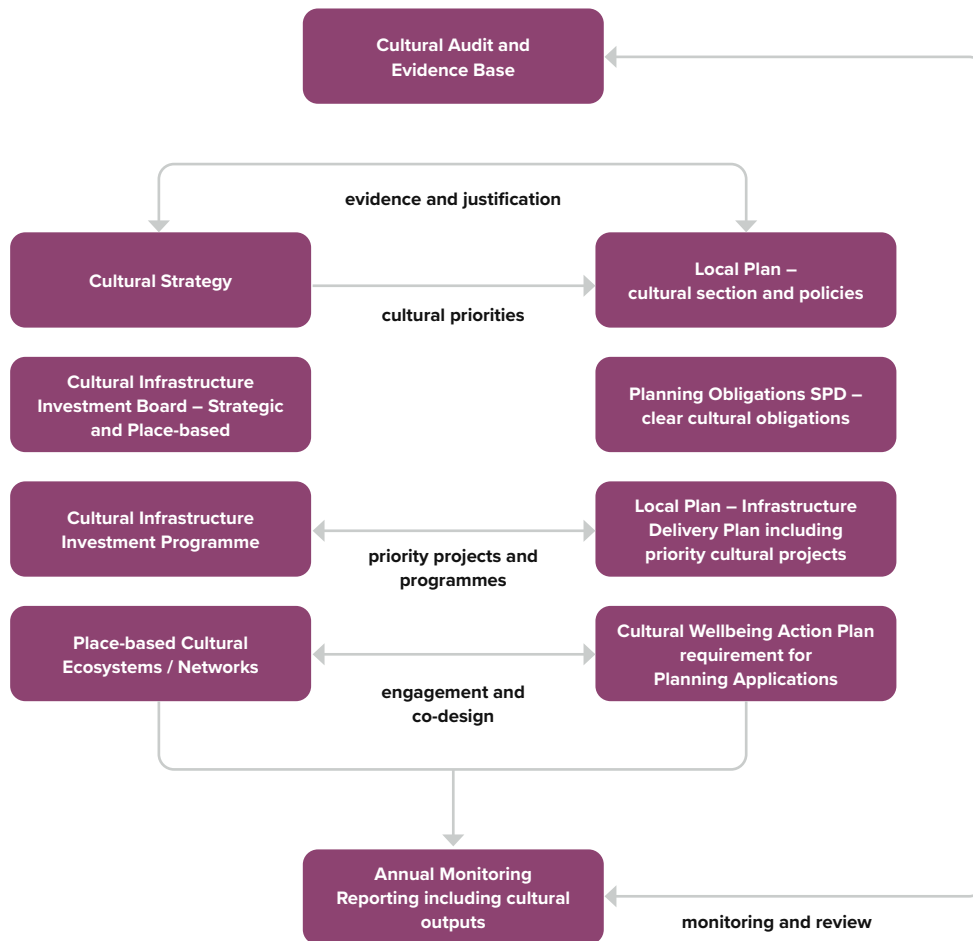
Local Development Plans should have a distinct section on cultural infrastructure, emphasising its role in driving place-making and delivering local socio-economic objectives. This should be supported by a Supplementary Planning Document, which operationalises the Local Plan's cultural policies. Creative workspace should also feature, for example, in Council's Property Investment Plans, Asset Management Plans, Infrastructure Delivery Plans, and Economic Development & Regeneration Plans.

¹⁷ Adapted from Creative Estuary Planning Toolkit; Town & Country Planning Association; November 2022

Engage Investors and Developers

Investors and Developers should be engaged at an early stage to develop Cultural Well-Being Action Plans, which set out how they can support the creative industries and work with local creative practitioners including co-designing development briefs.

Graphic 6: Developing Cultural Infrastructure¹⁸.



¹⁸ Creative Estuary Planning Toolkit; Town & Country Planning Association; November 2022

6.2 Additional Resources

This section provides links to additional resources that can help practitioners to develop business cases and local authorities and their partners to work collectively to develop the creative industries across the region.

Setting Priorities

Let's Create (2020-2030); Arts Council, England

<https://www.artscouncil.org.uk/our-strategy-2020-2030>

The South East Creative Economy Network Statement of Intent

<https://www.southeastlep.com/app/uploads/2021/09/SECEN-Statement-of-Intent-FINAL.pdf>

Planning and Regeneration

Cultural Infrastructure Plan and Toolbox

<https://www.creativeestuary.com/about-us/resources/>

Creating Open Workspaces; Regeneration Guide 2; Mayor of London; 2015

https://www.london.gov.uk/sites/default/files/regeneration_guide_2_-_creating_open_workspace.pdf

SECEN Creative Opportunity Zone Proposal Paper (March 2022)

Business Cases

Guide to Developing the Project Business Case; HM Treasury

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/749086/Project_Business_Case_2018.pdf

The Green Book (2022); HM Treasury

<https://www.gov.uk/government/publications/the-green-book-appraisal-and-evaluation-in-central-government/the-green-book-2020>

Additionality Guide (4th Edition); Homes & Communities Agency (now Homes England); 2014

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/378177/additionality_guide_2014_full.pdf

Research to Improve the Assessment of Additionality; BIS/CEA (2009)

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/191512/Research_to_improve_the_assessment_of_additionality.pdf

Heritage and the Value of Place; SIMETRICA Jacobs; 2021

<https://historicengland.org.uk/content/docs/research/heritage-value-of-place/>

DCMS Rapid Evidence Assessment: Culture and Heritage Valuation Studies; SIMETRICA Jacobs; 2020

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/955142/REA_culture_heritage_value_Simetrica.pdf

Valuing culture and heritage capital: a framework towards informing decision (2021)

<https://www.gov.uk/government/publications/valuing-culture-and-heritage-capital-a-framework-towards-decision-making/valuing-culture-and-heritage-capital-a-framework-towards-informing-decision-making>

Culture and Heritage Capital Evidence Bank; DCMS, SIMETRICA Jacobs; 2021

<https://www.simetrica-jacobs.com/news-and-views/culture-and-heritage-capital-a-guide-to-using-uk-government-tools-to-evidence-the-value-of-your-cultural-institution>

Project Prioritisation

East Sussex Cultural Project Pipeline

[Culture Priority Pipeline | East Sussex County Council](#)

Table A.1: Creative Industries Standard Industrial Code Classifications

Annex A

SIC (5 Digit)	Description	SIC (5 Digit)	Description
32120	Manufacture of jewellery and related articles	62012	Business and domestic software development
58110	Book publishing	62020	Computer consultancy activities
58120	Publishing of directories and mailing lists	70210	Public relations and communication activities
58130	Publishing of newspapers	71111	Architectural activities
-	Publishing of journals and periodicals	73110	Advertising agencies
58141	Publishing of learned journals	73120	Media representation
58142	Publishing of consumer, business and professional journals and periodicals	74100	Specialised design activities
58190	Other publishing activities	-	Photographic activities
58210	Publishing of computer games	74201	Portrait photographic activities
58290	Other software publishing	74202	Other specialist photography (not including portrait photography)
-	Motion picture, video and television programme activities	74203	Film processing
59111	Motion picture production activities	74209	Other photographic activities (not including portrait / other specialist photography and film processing) nec
59112	Video production activities	74300	Translation and interpretation activities
59113	Television programme production activities	85520	Cultural education
59120	Motion picture, video and television programme post-production activities	90010	Performing arts
59200	Sound recording and music publishing activities	90020	Support activities to performing arts
60100	Radio broadcasting	90030	Artistic creation
60200	Television programming and broadcasting activities	90040	Operation of arts facilities
-	Computer programming activities	-	Library and archive activities
62011	Ready-made interactive leisure and entertainment software development	91011	Library activities
		91012	Archive activities
		91020	Museum activities

Annex B

Creative Industries Sub Sectors

Table B.1: South East Creative Industries Sub Sectors – Jobs

DCMS Sub-Sector	Total Jobs	% of Total Creative jobs	LQ vs Eng	2015-2019 Change (%)
Advertising & Marketing	4,530	8%	0.53	-4%
Architecture	4,025	7%	0.77	+21%
Crafts	375	1%	1.35	-12%
Design	3,750	7%	1.12	+38%
Film, TV, video, radio & photography	4,405	8%	0.48	+12%
IT, software & computer services	23,970	44%	0.69	+12%
Museums, galleries & libraries	2,625	5%	0.8	-6%
Music, performing & visual arts	4,940	9%	0.71	+40%
Publishing	6,385	12%	1.00	-39%
TOTAL	55,005	100%	0.70	+2%

Table B.2: East Sussex Creative Industries Sub Sectors – Jobs

East Sussex	Total Jobs	% of Total Creative jobs	LQ vs Eng	2015-2019 Change (%)
Advertising & Marketing	475	8%	0.49	-14%
Architecture	525	9%	0.88	11%
Crafts	150	3%	4.77	0%
Design	400	7%	1.06	33%
Film, TV, video, radio & photography	540	9%	0.52	23%
IT, software & computer services	2,125	36%	0.54	14%
Museums, galleries & libraries	270	5%	0.73	-28%
Music, performing & visual arts	870	15%	1.10	-29%
Publishing	625	10%	0.86	-37%
TOTAL	5,980	100%	0.67	0%

Table B.3: Greater Essex Creative Industries Sub Sectors – Jobs

Greater Essex	2019	% of Total Creative jobs	LQ vs Eng	2015-2019 Change (%)
Advertising & Marketing	2,000	7%	0.53	-18%
Architecture	1,645	6%	0.71	5%
Crafts	125	0%	1.01	-17%
Design	2,025	7%	1.37	41%
Film, TV, video, radio & photography	2,210	8%	0.55	4%
IT, software & computer services	11,875	43%	0.77	9%
Museums, galleries & libraries	1,090	4%	0.75	-5%
Music, performing & visual arts	2,935	11%	0.95	182%
Publishing	3,750	14%	1.32	-38%
TOTAL	27,655	100%	0.80	1%

Table B.4: Kent & Medway Creative Industries Sub Sectors – Jobs

Kent & Medway	2019	% of Total Creative jobs	LQ vs Eng	2015-2019 Change (%)
Advertising & Marketing	2,055	10%	0.54	16%
Architecture	1,855	9%	0.80	45%
Crafts	100	0%	0.81	-20%
Design	1,325	6%	0.89	36%
Film, TV, video, radio & photography	1,655	8%	0.41	20%
IT, software & computer services	9,970	47%	0.64	16%
Museums, galleries & libraries	1,265	6%	0.87	0%
Music, performing & visual arts	1,135	5%	0.37	-11%
Publishing	2,010	9%	0.71	-41%
TOTAL	21,370	100%	0.61	6%

Annex C

Creative Industries by Place

Table C1: Creative Intensity (CI) Scores and Ranks

CI Rank	Place	CI Score	CI Rank	Place	CI Score
1	Royal Tunbridge Wells	190	27	Gillingham	110
2	Brentwood	189	28	Braintree	100
3	Chelmsford	187	29	Ramsgate	96
4	Colchester	175	30	Sittingbourne	95
5	Lewes	173	31	Margate	89
6	Canterbury	165	32	Swanscombe and Ebbsfleet	86
7	Billericay	160	33	Gravesend and Northfleet	85
8	Sevenoaks	160	34	Deal	76
9	Basildon	156	35	Ditton/Aylesford/East Malling	75
10	Dartford	149	36	Strood	75
11	Maidstone	141	37	Bexhill-on-Sea	65
12	Tonbridge	141	38	Eastbourne	65
13	Hastings	139	39	Seaford	63
14	Loughton	137	40	Herne Bay	60
15	Folkestone	135	41	Canvey Island	54
16	Harlow	130	42	Maldon	54
17	Wickford	128	43	Tilbury and East Tilbury	50
18	Southend-on-Sea	127	44	Purfleet and West Thurrock	48
19	Ashford	124	45	Stanford-le-Hope	45
20	Rayleigh/South Benfleet/Thundersley	124	46	Broadstairs	40
21	Whitstable	122	47	Clacton-on-Sea	32
22	Crowborough	121	48	Dover	31
23	Grays	120	49	Newhaven	29
24	Chatham and Rochester	116	50	Sheerness	26
25	Witham	116	51	Hailsham	20
26	Faversham	110			

Table C2: Creative Intensity – Jobs: Location Quotient (LQ) and Ranks

Rank	Place	LQ vs ENG	Rank	Place	LQ vs ENG
1	Brentwood	1.69	27	Braintree	0.51
2	Billericay	1.40	28	Seaford	0.51
3	Lewes	1.33	29	Strood	0.48
4	Wickford	1.19	30	Ashford	0.44
5	Royal Tunbridge Wells	1.16	31	Hastings	0.44
6	Witham	1.14	32	Ditton/Aylesford/East Malling	0.43
7	Crowborough	1.08	33	Herne Bay	0.43
8	Colchester	0.98	34	Gillingham	0.42
9	Loughton	0.96	35	Dartford	0.42
10	Basildon	0.90	36	Ramsgate	0.42
11	Chelmsford	0.88	37	Maldon	0.42
12	Folkestone	0.8	38	Newhaven	0.4
13	Faversham	0.79	39	Broadstairs	0.39
14	Sevenoaks	0.72	40	Gravesend and Northfleet	0.38
15	Canterbury	0.72	41	Stanford-le-Hope	0.37
16	Southend-on-Sea	0.70	42	Margate	0.37
17	Tonbridge	0.70	43	Sittingbourne	0.35
18	Maidstone	0.67	44	Clacton-on-Sea	0.33
19	Swanscombe and Ebbsfleet	0.66	45	Purfleet and West Thurrock	0.31
20	Whitstable	0.63	46	Dover	0.31
21	Rayleigh/South Benfleet/Thundersley	0.61	47	Eastbourne	0.29
22	Grays	0.57	48	Hailsham	0.29
23	Canvey Island	0.57	49	Bexhill-on-Sea	0.28
24	Chatham and Rochester	0.56	50	Tilbury and East Tilbury	0.29
25	Harlow	0.55	51	Sheerness	0.13
26	Deal	0.54			

Table C3: Percentage of South East Creative Jobs by Place and Ranks

Rank	Place	% of South East Creative Jobs	Rank	Place	% of South East Creative Jobs
1	Colchester	5.3%	27	Sittingbourne	0.8%
2	Basildon	5.0%	28	Purfleet and West Thurrock	0.8%
3	Chelmsford	4.8%	29	Strood	0.8%
4	Southend-on-Sea	3.9%	30	Eastbourne	0.6%
5	Brentwood	3.1%	31	Ramsgate	0.6%
6	Maidstone	2.8%	32	Whitstable	0.6%
7	Canterbury	2.2%	33	Crowborough	0.6%
8	Royal Tunbridge Wells	2.2%	34	Ditton/Aylesford/East Malling	0.5%
9	Harlow	1.9%	35	Faversham	0.5%
10	Dartford	1.7%	36	Margate	0.5%
11	Gillingham	1.5%	37	Clacton-on-Sea	0.4%
12	Folkestone	1.5%	38	Dover	0.4%
13	Lewes	1.5%	39	Canvey Island	0.4%
14	Loughton	1.5%	40	Maldon	0.3%
15	Ashford	1.4%	41	Bexhill-on-Sea	0.3%
16	Billericay	1.4%	42	Herne Bay	0.3%
17	Rayleigh/South Benfleet/Thundersley	1.3%	43	Swanscombe and Ebbsfleet	0.3%
18	Chatham and Rochester	1.2%	44	Deal	0.2%
19	Witham	1.2%	45	Stanford-le-Hope	0.2%
20	Hastings	1.2%	46	Seaford	0.2%
21	Sevenoaks	1.1%	47	Newhaven	0.2%
22	Wickford	1.1%	48	Tilbury and East Tilbury	0.2%
23	Tonbridge	1.0%	49	Hailsham	0.2%
24	Gravesend and Northfleet	0.9%	50	Broadstairs	0.1%
25	Grays	0.9%	51	Sheerness	0.0%
26	Braintree	0.8%			

Table C4: Creative Intensity – Businesses: Location Quotient (LQ) and Ranks

Rank	Place	LQ vs ENG	Rank	Place	LQ vs ENG
1	Lewes	2.07	27	Ditton/Aylesford/East Malling	0.80
2	Royal Tunbridge Wells	1.60	28	Braintree	0.77
3	Sevenoaks	1.50	29	Seaford	0.77
4	Tonbridge	1.46	30	Chatham and Rochester	0.76
5	Chelmsford	1.25	31	Harlow	0.73
6	Dartford	1.18	32	Broadstairs	0.72
7	Canterbury	1.18	33	Basildon	0.71
8	Brentwood	1.14	34	Maidstone	0.71
9	Billericay	1.12	35	Rayleigh/South Benfleet/Thundersley	0.68
10	Whitstable	1.11	36	Eastbourne	0.68
11	Swanscombe and Ebbsfleet	1.10	37	Herne Bay	0.65
12	Hastings	1.09	38	Gillingham	0.65
13	Faversham	1.05	39	Maldon	0.64
14	Crowborough	1.04	40	Gravesend and Northfleet	0.62
15	Margate	1.03	41	Strood	0.60
16	Witham	0.99	42	Sittingbourne	0.60
17	Ramsgate	0.98	43	Hailsham	0.55
18	Southend-on-Sea	0.97	44	Newhaven	0.54
19	Wickford	0.89	45	Stanford-le-Hope	0.53
20	Colchester	0.87	46	Purfleet and West Thurrock	0.51
21	Bexhill-on-Sea	0.86	47	Dover	0.46
22	Ashford	0.84	48	Canvey Island	0.39
23	Deal	0.82	49	Tilbury and East Tilbury	0.38
24	Folkestone	0.82	50	Clacton-on-Sea	0.38
25	Grays	0.82	51	Sheerness	0.27
26	Loughton	0.81			

Table C5: Percentage of South East Creative Businesses by Place and Ranks

Rank	Place	% of South East Creative Jobs	Rank	Place	% of South East Creative Jobs
1	Southend-on-Sea	4.5%	27	Braintree	0.8%
2	Chelmsford	3.5%	28	Ramsgate	0.8%
3	Royal Tunbridge Wells	2.6%	29	Sittingbourne	0.8%
4	Colchester	2.6%	30	Eastbourne	0.8%
5	Brentwood	2.0%	31	Bexhill-on-Sea	0.7%
6	Hastings	2.0%	32	Strood	0.7%
7	Basildon	2.0%	33	Crowborough	0.6%
8	Dartford	1.9%	34	Swanscombe and Ebbsfleet	0.6%
9	Maidstone	1.9%	35	Witham	0.6%
10	Sevenoaks	1.8%	36	Herne Bay	0.5%
11	Rayleigh/South Benfleet/Thundersley	1.7%	37	Faversham	0.5%
12	Tonbridge	1.6%	38	Maldon	0.5%
13	Harlow	1.5%	39	Deal	0.4%
14	Canterbury	1.3%	40	Ditton/Aylesford/East Malling	0.4%
15	Gillingham	1.3%	41	Purfleet and West Thurrock	0.4%
16	Grays	1.3%	42	Seaford	0.4%
17	Ashford	1.3%	43	Stanford-le-Hope	0.3%
18	Gravesend and Northfleet	1.3%	44	Canvey Island	0.3%
19	Lewes	1.3%	45	Clacton-on-Sea	0.3%
20	Chatham and Rochester	1.2%	46	Dover	0.3%
21	Billericay	1.1%	47	Broadstairs	0.3%
22	Loughton	1.1%	48	Hailsham	0.2%
23	Whitstable	0.9%	49	Tilbury and East Tilbury	0.2%
24	Wickford	0.9%	50	Newhaven	0.2%
25	Folkestone	0.9%	51	Sheerness	0.1%
26	Margate	0.9%			

Table C6: Creative Growth (CG) Scores and Ranks

CG Rank	Place	CG Score	CG Rank	Place	CG Score
1	Chelmsford	197	27	Maidstone	101
2	Dartford	194	28	Strood	100
3	Margate	178	29	Grays	98
4	Dover	167	30	Sheerness	97
5	Braintree	156	31	Wickford	97
6	Purfleet and West Thurrock	146	32	Deal	96
7	Ramsgate	141	33	Sittingbourne	91
8	Maldon	140	34	Basildon	89
9	Southend-on-Sea	140	35	Faversham	88
10	Swanscombe and Ebbsfleet	140	36	Whitstable	88
11	Folkestone	139	37	Crowborough	82
12	Tilbury and East Tilbury	139	38	Hastings	78
13	Ditton/Aylesford/East Malling	137	39	Eastbourne	77
14	Witham	124	40	Royal Tunbridge Wells	77
15	Ashford	123	41	Sevenoaks	72
16	Chatham and Rochester	120	42	Gravesend and Northfleet	70
17	Stanford-le-Hope	116	43	Newhaven	70
18	Lewes	112	44	Canvey Island	66
19	Herne Bay	111	45	Loughton	63
20	Broadstairs	107	46	Hailsham	61
21	Tonbridge	106	47	Gillingham	51
22	Canterbury	105	48	Bexhill-on-Sea	39
23	Clacton-on-Sea	103	49	Brentwood	39
24	Rayleigh/South Benfleet/Thundersley	103	50	Seaford	36
25	Billericay	102	51	Colchester	27
26	Harlow	101			

Table C7: Five Year Growth in Creative Jobs by Place and Rank (2015-2019)

Rank	Place	5 Year Change	Rank	Place	5 Year Change
1	Chelmsford	+535	27	Ramsgate	+15
2	Southend-on-Sea	+475	28	Broadstairs	+10
3	Purfleet and West Thurrock	+190	29	Witham	+10
4	Rayleigh/South Benfleet/Thundersley	+160	30	Eastbourne	-5
5	Dover	+130	31	Sheerness	-5
6	Dartford	+100	32	Strood	-10
7	Grays	+85	33	Newhaven	-20
8	Billericay	+75	34	Faversham	-25
9	Braintree	+75	35	Gravesend and Northfleet	-40
10	Lewes	+75	36	Hailsham	-40
11	Margate	+70	37	Seaford	-40
12	Chatham and Rochester	+65	38	Sevenoaks	-50
13	Sittingbourne	+65	39	Gillingham	-65
14	Maldon	+60	40	Whitstable	-65
15	Tilbury and East Tilbury	+55	41	Canterbury	-70
16	Clacton-on-Sea	+50	42	Bexhill-on-Sea	-75
17	Stanford-le-Hope	+50	43	Hastings	-140
18	Ashford	+40	44	Royal Tunbridge Wells	-155
19	Folkestone	+40	45	Tonbridge	-165
20	Herne Bay	+40	46	Harlow	-175
21	Canvey Island	+35	47	Loughton	-255
22	Maidstone	+35	48	Colchester	-340
23	Deal	+30	49	Brentwood	-430
24	Ditton/Aylesford/East Malling	+30	50	Basildon	-845
25	Crowborough	+25	51	Wickford	-1090
26	Swanscombe and Ebbsfleet	+25			

Table C8: Five Year Growth in Creative Businesses by Place and Rank (2016-2020)

Rank	Place	Change	Rank	Place	Change
1	Dartford	+140	27	Broadstairs	
2	Chelmsford	+110	28	Chatham and Rochester	
3	Margate	+75	29	Faversham	
4	Tonbridge	+55	30	Gravesend and Northfleet	
5	Wickford	+50	31	Herne Bay	
6	Basildon	+45	32	Maidstone	
7	Ramsgate	+45	33	Purfleet and West Thurrock	
8	Harlow	+40	34	Sheerness	
9	Swanscombe and Ebbsfleet	+40	35	Stanford-le-Hope	
10	Royal Tunbridge Wells	+35	36	Colchester	
11	Canterbury	+30	37	Deal	
12	Hastings	+30	38	Eastbourne	
13	Southend-on-Sea	+30	39	Gillingham	
14	Braintree	+20	40	Lewes	
15	Ditton/Aylesford/East Malling	+20	41	Clacton-on-Sea	
16	Folkestone	+20	42	Crowborough	
17	Whitstable	+20	43	Hailsham	
18	Witham	+20	44	Newhaven	
19	Ashford	+15	45	Bexhill-on-Sea	
20	Dover	+15	46	Billericay	
21	Loughton	+15	47	Grays	
22	Maldon	+15	48	Rayleigh/South Benfleet/Thundersley	
23	Sevenoaks	+15	49	Sittingbourne	
24	Strood	+15	50	Seaford	
25	Tilbury and East Tilbury	+15	51	Canvey Island	
26	Brentwood	+10			

Annex D

General Place Characteristics

Table D1: Population by Place (2019)

Rank	Area	Total	Rank	Area	Total
1	Southend-on-Sea	183,125	27	Herne Bay	42,759
2	Colchester	137,095	28	Dover	41,890
3	Gillingham	117,448	29	Canvey Island	38,849
4	Basildon	117,337	30	Strood	37,692
5	Maidstone	109,142	31	Loughton	33,088
6	Chelmsford	99,302	32	Whitstable	32,610
7	Hastings	92,661	33	Wickford	32,402
8	Harlow	87,067	34	Deal	31,327
9	Gravesend and Northfleet	86,738	35	Sevenoaks	30,650
10	Rayleigh/South Benfleet/Thundersley	86,124	36	Billericay	30,475
11	Chatham and Rochester	78,955	37	Stanford-le-Hope	29,286
12	Ashford	74,687	38	Witham	26,305
13	Eastbourne	72,084	39	Seaford	24,639
14	Canterbury	62,365	40	Purfleet and West Thurrock	24,469
15	Sittingbourne	61,508	41	Maldon	23,198
16	Grays	59,974	42	Ditton/Aylesford/East Malling	22,427
17	Dartford	57,056	43	Crowborough	22,212
18	Clacton-on-Sea	53,768	44	Tilbury and East Tilbury	21,982
19	Folkestone	53,754	45	Swanscombe and Ebbsfleet	21,627
20	Margate	52,119	46	Faversham	20,105
21	Ramsgate	49,244	47	Hailsham	18,194
22	Brentwood	45,984	48	Lewes	17,943
23	Bexhill-on-Sea	45,830	49	Broadstairs	14,979
24	Braintree	44,293	50	Sheerness	13,418
25	Royal Tunbridge Wells	43,210	51	Newhaven	13,095
26	Tonbridge	42,764			

Table D2: Total Jobs by Place (2019)

Rank	Area	Total Jobs	Rank	Area	Total Jobs
1	Basildon	63,400	27	Tonbridge	16,250
2	Southend-on-Sea	63,250	28	Margate	15,500
3	Chelmsford	62,500	29	Dover	15,250
4	Colchester	62,250	30	Clacton-on-Sea	15,050
5	Maidstone	47,750	31	Ditton/Aylesford/East Malling	14,500
6	Dartford	46,250	32	Bexhill-on-Sea	12,500
7	Gillingham	41,850	33	Lewes	12,500
8	Harlow	40,300	34	Witham	12,050
9	Ashford	37,450	35	Billericay	11,500
10	Canterbury	35,500	36	Whitstable	11,000
11	Hastings	30,650	37	Wickford	10,500
12	Purfleet and West Thurrock	28,500	38	Maldon	9,250
13	Gravesend and Northfleet	26,650	39	Herne Bay	8,250
14	Sittingbourne	26,000	40	Canvey Island	7,250
15	Chatham and Rochester	24,600	41	Faversham	7,250
16	Eastbourne	24,600	42	Tilbury and East Tilbury	7,250
17	Rayleigh/South Benfleet/Thundersley	24,250	43	Hailsham	6,800
18	Royal Tunbridge Wells	21,750	44	Stanford-le-Hope	6,450
19	Folkestone	20,950	45	Crowborough	6,250
20	Brentwood	20,900	46	Newhaven	5,250
21	Strood	18,400	47	Deal	5,150
22	Braintree	17,750	48	Seaford	4,500
23	Loughton	17,250	49	Swanscombe and Ebbsfleet	4,400
24	Sevenoaks	17,250	50	Sheerness	4,000
25	Grays	17,000	51	Broadstairs	3,750
26	Ramsgate	16,850			

Table D3: Job Density by Place (2019)

Rank	Area	Job Density	Rank	Area	Job Density
1	Purfleet and West Thurrock	1.77	27	Whitstable	0.61
2	Dartford	1.26	28	Ramsgate	0.58
3	Lewes	1.13	29	Dover	0.58
4	Ditton/Aylesford/East Malling	1.09	30	Eastbourne	0.58
5	Chelmsford	0.99	31	Southend-on-Sea	0.57
6	Sevenoaks	0.97	32	Gillingham	0.57
7	Basildon	0.86	33	Hastings	0.54
8	Loughton	0.82	34	Tilbury and East Tilbury	0.54
9	Ashford	0.8	35	Bexhill-on-Sea	0.53
10	Royal Tunbridge Wells	0.8	36	Wickford	0.53
11	Strood	0.78	37	Clacton-on-Sea	0.53
12	Canterbury	0.77	38	Margate	0.51
13	Harlow	0.75	39	Sheerness	0.50
14	Brentwood	0.74	40	Gravesend and Northfleet	0.49
15	Witham	0.74	41	Crowborough	0.49
16	Maidstone	0.71	42	Chatham and Rochester	0.49
17	Colchester	0.69	43	Rayleigh/South Benfleet/Thundersley	0.48
18	Sittingbourne	0.69	44	Broadstairs	0.47
19	Hailsham	0.67	45	Grays	0.44
20	Maldon	0.67	46	Stanford-le-Hope	0.37
21	Newhaven	0.66	47	Seaford	0.35
22	Braintree	0.65	48	Herne Bay	0.34
23	Billericay	0.64	49	Canvey Island	0.33
24	Folkestone	0.63	50	Swanscombe and Ebbsfleet	0.30
25	Tonbridge	0.63	51	Deal	0.28
26	Faversham	0.61			

Table D4: Five-Year Total Job Change by Place 2015-2019

Rank	Area	5 Year Change (15-19)	Rank	Area	5 Year Change (15-19)
1	Chelmsford	+7,100	27	Canvey Island	+250
2	Basildon	+4,500	28	Herne Bay	+250
3	Loughton	+3,500	29	Sevenoaks	+250
4	Gillingham	+2,650	30	Tilbury and East Tilbury	+250
5	Gravesend and Northfleet	+2,450	31	Wickford	+250
6	Grays	+2,300	32	Ramsgate	+150
7	Whitstable	+1,850	33	Maldon	0
8	Ashford	+1,750	34	Newhaven	0
9	Rayleigh/South Benfleet/Thundersley	+1,750	35	Hastings	-100
10	Eastbourne	+1,550	36	Folkestone	-150
11	Strood	+1,550	37	Deal	-200
12	Ditton/Aylesford/East Malling	+1,500	38	Maidstone	-250
13	Swanscombe and Ebbsfleet	+1,350	39	Seaford	-250
14	Sittingbourne	+1,250	40	Sheerness	-250
15	Colchester	+1,100	41	Broadstairs	-500
16	Faversham	+1,000	42	Crowborough	-750
17	Margate	+1,000	43	Purfleet and West Thurrock	-750
18	Stanford-le-Hope	+1,000	44	Brentwood	-1,000
19	Clacton-on-Sea	+950	45	Dover	-1,000
20	Tonbridge	+800	46	Southend-on-Sea	-1,000
21	Hailsham	+750	47	Canterbury	-1,250
22	Chatham and Rochester	+550	48	Harlow	-1,250
23	Bexhill-on-Sea	+500	49	Witham	-1,750
24	Billericay	+500	50	Dartford	-5,250
25	Braintree	+500	51	Royal Tunbridge Wells	-9,500
26	Lewes	+500			

Table D5: Total Businesses by Place

Rank	Area	Businesses (2020)	Rank	Area	Businesses (2020)
1	Southend-on-Sea	6,990	27	Billericay	1,550
2	Colchester	4,500	28	Margate	1,310
3	Chelmsford	4,265	29	Ramsgate	1,290
4	Basildon	4,255	30	Whitstable	1,290
5	Maidstone	3,980	31	Purfleet and West Thurrock	1,285
6	Rayleigh/South Benfleet/Thundersley	3,775	32	Bexhill-on-Sea	1,265
7	Harlow	3,140	33	Herne Bay	1,200
8	Gillingham	3,135	34	Clacton-on-Sea	1,155
9	Gravesend and Northfleet	3,085	35	Canvey Island	1,110
10	Hastings	2,825	36	Maldon	1,080
11	Brentwood	2,700	37	Stanford-le-Hope	990
12	Grays	2,480	38	Dover	950
13	Dartford	2,470	39	Lewes	925
14	Royal Tunbridge Wells	2,465	40	Crowborough	920
15	Chatham and Rochester	2,395	41	Witham	875
16	Ashford	2,380	42	Ditton/Aylesford/East Malling	815
17	Sittingbourne	2,100	43	Deal	790
18	Loughton	2,025	44	Swanscombe and Ebbsfleet	790
19	Eastbourne	1,795	45	Tilbury and East Tilbury	790
20	Sevenoaks	1,790	46	Seaford	735
21	Canterbury	1,735	47	Faversham	660
22	Strood	1,665	48	Hailsham	635
23	Braintree	1,635	49	Broadstairs	540
24	Folkestone	1,635	50	Newhaven	485
25	Tonbridge	1,635	51	Sheerness	325
26	Wickford	1,610			

Table D6: Five-Year Total Business Change by Place 2015-2019

Rank	Area	5 Year Change	Rank	Area	5 Year Change
1	Basildon	+655	27	Ditton/Aylesford/East Malling	+85
2	Dartford	+490	28	Herne Bay	+85
3	Grays	+460	29	Canterbury	+80
4	Colchester	+445	30	Billericay	+75
5	Maidstone	+420	31	Folkestone	+75
6	Gravesend and Northfleet	+400	32	Maldon	+75
7	Chelmsford	+395	33	Tonbridge	+75
8	Harlow	+385	34	Wickford	+65
9	Brentwood	+290	35	Faversham	+40
10	Loughton	+280	36	Royal Tunbridge Wells	+40
11	Ashford	+270	37	Deal	+30
12	Southend-on-Sea	+255	38	Newhaven	+25
13	Purfleet and West Thurrock	+250	39	Whitstable	+25
14	Chatham and Rochester	+230	40	Bexhill-on-Sea	+20
15	Rayleigh/South Benfleet/Thundersley	+230	41	Broadstairs	+20
16	Sittingbourne	+230	42	Sheerness	+20
17	Gillingham	+225	43	Braintree	+10
18	Swanscombe and Ebbsfleet	+160	44	Crowborough	0
19	Margate	+150	45	Seaford	0
20	Tilbury and East Tilbury	+135	46	Sevenoaks	0
21	Hastings	+125	47	Hailsham	-10
22	Ramsgate	+110	48	Witham	-15
23	Stanford-le-Hope	+105	49	Clacton-on-Sea	-30
24	Strood	+105	50	Lewes	-30
25	Dover	+100	51	Canvey Island	-35
26	Eastbourne	+90			

Table D7: Number of Mid Lay Super Output Areas in 20% Most Deprived in England by Place (2019)

Place	Total MSOAs	No. MSOA's in 20% most deprived	% of MSOA's in 20% most deprived	Place	Total MSOAs	No. MSOA's in 20% most deprived	% of MSOA's in 20% most deprived
Sheerness	2	2	100%	Brentwood	5	0	0%
Dover	4	3	75%	Broadstairs	2	0	0%
Margate	6	4	67%	Chelmsford	11	0	0%
Clacton-on-Sea	7	4	57%	Crowborough	3	0	0%
Hastings	11	6	55%	Deal	4	0	0%
Folkestone	6	3	50%	Ditton/Aylesford/East Malling	2	0	0%
Tilbury and East Tilbury	2	1	50%	Faversham	2	0	0%
Basildon	13	6	46%	Grays	7	0	0%
Ramsgate	6	2	33%	Hailsham	3	0	0%
Chatham and Rochester	11	3	27%	Harlow	11	0	0%
Gillingham	16	4	25%	Lewes	2	0	0%
Eastbourne	9	2	22%	Loughton	4	0	0%
Bexhill-on-Sea	5	1	20%	Maldon	3	0	0%
Canvey Island	5	1	20%	Newhaven	2	0	0%
Gravesend and Northfleet	10	2	20%	Purfleet and West Thurrock	2	0	0%
Herne Bay	5	1	20%	Rayleigh/South Benfleet/Thundersley	11	0	0%
Strood	5	1	20%	Royal Tunbridge Wells	5	0	0%
Southend-on-Sea	17	3	18%	Seaford	3	0	0%
Canterbury	6	1	17%	Sevenoaks	3	0	0%
Dartford	6	1	17%	Stanford-le-Hope	4	0	0%
Sittingbourne	6	1	17%	Swanscombe and Ebbsfleet	2	0	0%
Maidstone	11	1	9%	Tonbridge	5	0	0%
Colchester	13	1	8%	Whitstable	4	0	0%
Ashford	7	0	0%	Wickford	4	0	0%
Billericay	4	0	0%	Witham	3	0	0%
Braintree	5	0	0%				

Glossary of Terms

BRES – Business Register and Employment Survey.

Creative Industries – Those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property (DCMS).

Creative Opportunity Zones - A new intervention to drive inclusive growth and facilitate sustainable culture-led regeneration in the South East Creative Economy.

DCMS – Department for Culture, Media and Sport.

Devolution Deals - Devolution is the transfer of powers and funding from national to local government, ensuring that decisions are made closer to the local people, communities and businesses they affect.

Five Case Model – The Government’s Green Book approach for developing business cases recommended by HM Treasury, the Welsh Government and the UK Office of Government Commerce.

Location Quotient (LQ) – Are ratios that allow an area’s distribution of employment by industry, ownership, and size class to be compared to a reference area’s distribution.

NPPF – National Planning Policy Framework.

R & D – Research & Development.

SECEN – South East Creative Economy Network.

South East Region – For the purposes of this Strategic Framework, the South East refers to Greater Essex, Kent & Medway and East Sussex.

Standard Industrial Classification (SIC) – A four-digit classification system that classifies industries according to business activities.

UK Business Counts - An extract compiled from the Inter Departmental Business Register (IDBR) recording the number of Enterprises that were live at a reference date in March, broken down by employment size band, detailed industry (5 digit SIC2007) and legal status.

Wider South East Region – Buckinghamshire, East Sussex, Hampshire, Isle of Wight, Oxfordshire, Berkshire, Surrey, West Sussex and their constituent Unitary Authorities.



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