

## CASE Regional Insights

The CASE (Culture and Sport Evidence) programme is a joint strategic research programme, led by DCMS in association with Arts Council England, English Heritage, Museums, Libraries and Archives Council and Sport England. The programme aims to influence the policy agenda in culture and sport in England by generating high quality, relevant research with easy access to a range of analysis and data for partners to build sound arguments.

As part of the CASE programme, Regional Insights has been developed to provide partners with data and evidence on the position and role of culture and sport within key local and regional agendas.

## The purpose of this work

The aim of the project is to provide culture and sport agencies, local authorities and other public bodies with a set of statistical data about CASE sectors. The data is organised within a number of themes such as the economy, education and engagement. Within each theme, the data is broken down by region and, where possible, local authority area. The consistent format allows for comparison across and within sectors and geographies. The importance of particular themes and sectors will vary by place, but the overall approach to accessing, comparing and using the data will be similar.

Regional Insights has been designed to deliver a quantitative picture, to help local partners to identify key trends in culture and sport in their area and where there is potential for growth. Combined with other research and local knowledge, this data can point to areas where further investment is justified.

The purpose is to provide consistent quality data, which enables users to quickly and easily identify quantitative evidence to support the development of clear arguments for investment in culture and sport.

## How should it be used?

Regional Insights is a dataset – a compendium of quantitative data and facts. The dataset is accompanied by a summary report for each region. These reports are not intended to provide a comprehensive interpretation of the

data. Rather, they provide an overview of the type of data available so that you can choose what to interrogate in more detail.

This report is the 2010 South East Regional Insights report. The dataset used to support this report contains the most current data available from the various different sources. The data should be used alongside the qualitative insight you have about the working context of your locality or region. It is not designed to provide the whole story, but to support you in writing it. You decide what data is most important and how to link it to your priorities.

## Where you can find the data

The dataset is available to download from the [CASE website](http://www.culture.gov.uk/case/).<sup>1</sup>

There are 8 sections in the dataset:

Section	Data contained
CASE Economy	Gross value added, businesses, turnover, employment, volunteering, and business start-up.
Non-capital Investment	Local authority, central government, lottery and private investment in the sector.
Capital Investment	Sector specific capital investment, local authority land acquisition and construction.
Tourism	Domestic overnight tourism, inbound tourism, visits to visitor attractions
Education	Participation in Higher Education, Further Education GCSE level education and in non mainstream CASE related education programmes
Physical Assets	Number and density of physical assets.
Engagement	Participation in activities across CASE sectors and levels of satisfaction
Community & Wellbeing	Feelings on community cohesion, belonging, community safety

For further information on the CASE programme please visit [www.culture.gov.uk/case/](http://www.culture.gov.uk/case/) or email [case@culture.gsi.gov.uk](mailto:case@culture.gsi.gov.uk).

<sup>1</sup> [http://www.culture.gov.uk/what\\_we\\_do/research\\_and\\_statistics/7276.aspx](http://www.culture.gov.uk/what_we_do/research_and_statistics/7276.aspx)

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## 2010: Key Statistics

The CASE economy in the South East:

- Employs 339,000 people
- Includes 37,600 businesses
- Contributes £12 billion in Gross Value Added (GVA)
- Generates £2.6 billion/year in spend from domestic tourists

Across the CASE sectors in the South East:

- 637,000 people work on a voluntary basis
- The average business turns over £860,000
- There were 13,500 new business start-ups between 2006 and 2009
- There are 30,000 physical assets

Investment in the sector totals:

- £546 million in non-capital investment from local government
- £104 million<sup>2</sup> in capital focused investment from local government
- £46 million<sup>3</sup> in lottery investment
- £39.7 million in private investment in the arts

Engagement in the sector is extensive:

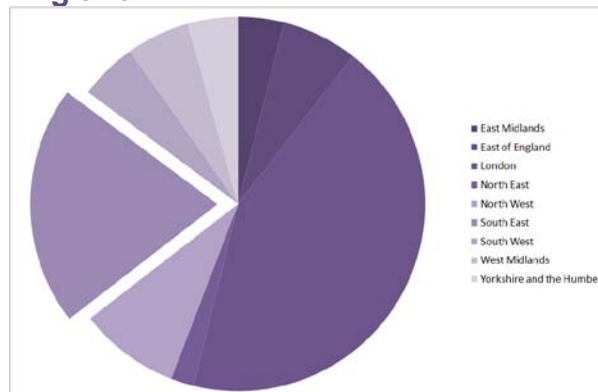
- 3.9 million people participating in cultural activity<sup>4</sup>
- 1.2 million participating in 3 sessions of sport per week
- 156,000 people studying at GCSE level
- 37,000 higher education students
- 197,000 people studying at FE institutes

<sup>2</sup> Not including Heritage spending, this is captured under non-capital investment.

<sup>3</sup> Investment in the arts, sports and heritage.

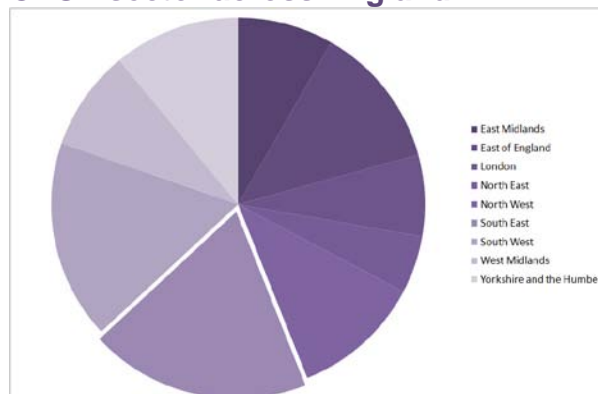
<sup>4</sup> Includes participation in: craft, dance, literature, music, theatre and the visual arts.

## South East GVA as a proportion of total GVA for the CASE sectors across England



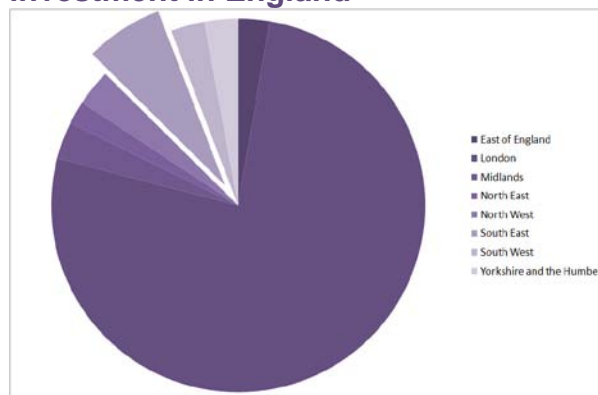
Source: ONS, ABI (2009)

## South East physical assets as a proportion of the total assets in the CASE sector across England



Source: IM, POI (2009)

## South East private investment in the arts as a proportion of total private investment in England



Source: A&B (2009)

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## CASE Economy

Data in this section is drawn from the CASE Economy data tables available from the Regional Insights website. Key sources include:

- Annual Population Survey (APS)
- Annual Business Inquiry (ABI)
- Inter-Departmental Business Register (IDBR)
- Trends Central Resource (TCR)

Across the South East 339,000 people are employed in the CASE sectors. This increased by 1% between 2006 and 2008.

Outside London, the South East has the highest regional employment in the creative sector. Heritage employment in the region was also the third greatest following London and the South West. However, South East heritage employment fell by 17% between 2006 and 2008, reducing from 6,800 to 5,600.

CASE sectors attract high levels of volunteer engagement. Approximately 637,000 people undertook voluntary work in the South East in 2007/08 in the CASE sectors.

There are 37,600 CASE organisations in the South East, contributing £12 billion GVA in 2007/08. Of these, 13,400 are new start-ups since 2006. The large majority (12,700) of new start-ups are creative businesses.

GVA produced by CASE sectors increased in the South East by 0.1% between 2005/06 and 2007/08, from £2.8 billion to £2.9 billion. More than three quarters (89%) of CASE GVA produced in 2007/08 was contributed by creative firms.

## Top 5 Local Authorities in the South East by number of CASE businesses

Local Authority	Businesses
Brighton and Hove	1,611
Windsor and Maidenhead	1,207
Elmbridge	1,184
Milton Keynes	1,163
Wycombe	1,135

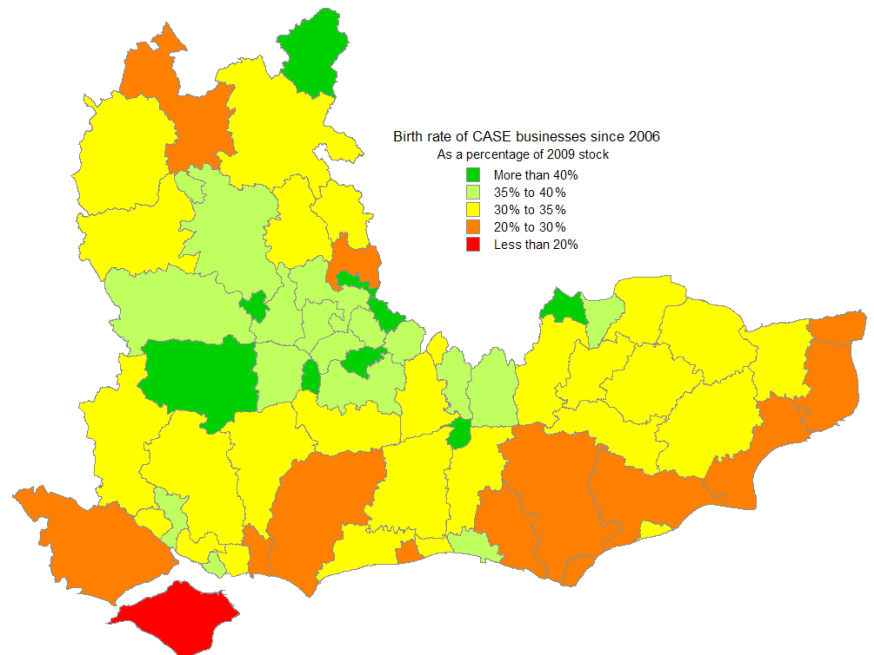
Source: IDBR (2009)

## Top 5 Local Authorities in the South East by level of CASE employment

Local Authority	Employment
Reading	10,536
Oxford	9,271
Milton Keynes	8,213
Brighton and Hove	7,299
West Berkshire	6,097

## Start-up rates across the region by local authority

Source: TCR (2009)



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## Non-Capital Investment

Data in this section is drawn from the non-capital investment data tables available from the Regional Insights website. Key sources include:

- Department for Communities and Local Government (DCLG), Local Government Finance Statistics (LGFS)
- Department for Culture Media and Sport (DCMS), National Lottery database (NLD)
- Arts Council England, (ACE) Regularly Funded Organisations (RFO) Annual Submission Dataset
- Arts & Business (A & B) Annual Investment in Culture Survey
- Heritage Lottery Fund (HLF) Initial Grant Decisions Data

This report focuses on non-capital investment in sector development by Local Authorities. For example, service or community development.

Between 2004/05 and 2008/09 local authority investment in CASE sectors increased in real terms in all regions bar one<sup>5</sup>. The sixth greatest percentage increase in CASE sector investment was in the South East, where local authority expenditure increased by 7% over the period; reaching approximately £546 million in 2008/09.

In most regions, sports and MLA expenditure represent the majority of local authority spending on CASE sectors. In the South East in 2008/09 sports funding was worth £200.3 million and MLA funding was worth £204.8 million of all local authority spend in the region.

Local authority investment in the arts increased by 22% (from £107 million to £131 million) between 2004/05 and 08/09. This was a greater proportional increase than occurred in any other region.

Local authority investment in sports services was £200 million in 2008/09, the

highest investment spend within the regions.

However, the South East has the third lowest density<sup>6</sup> of local authority investment in sport, with £205,000 per 10,000 people invested in 2008/09; compared to £302,000 in the North East and £270,000 in South East.

Although in real terms, investment in the region's library services fell by 1% between 2004/05 and 2008/09, local authorities in the South East made the second largest expenditure in these services in both years – in 2008/09 this was £155.1 million.

Local authority investment in heritage increased from £5.7 million to £9.8 million across 2004/05 – 2008/09. The density of heritage spending in the region was below average in 2008/09, at £20,000 per 10,000 people compared to an average of £22,000 across England.

## Top 10 LAs for non-capital investment in CASE sectors in 2008/09

Local Authority	Investment £000s
Hampshire	47,661
Kent	37,597
Brighton & Hove	34,499
Southampton	29,044
Surrey	25,498
Reading	19,928
Oxfordshire	18,032
Portsmouth	16,845
Medway	16,119
Bracknell Forest	14,466

Source: DCLG, LGFS (2009)

<sup>5</sup> Investment in CASE sectors in the East of England reduced by less than 0.02% between 2004/05 and 2008/09.

<sup>6</sup> Investment in thousands of pounds per 10,000 of the working age (WA) population of that administrative area – local authority or region.

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## Capital Investment

Data in this section is drawn from the Capital Investment data tables available from the Regional Insights website. Key sources include:

- Department for Communities and Local Government (DCLG), Local Government Finance Statistics (LGFS)
- Department for Culture, Media and Sport (DCMS), National Lottery database (NLD)
- Sport England (SE) Exchequer Funding Data

Local authority capital expenditure is divided between acquisition of land and existing buildings (hereafter acquisition investment) and new construction, conversion and renovation (new construction investment). References to 'CASE sectors' in this section exclude heritage, as data was not available.

Between 2004/05 and 2008/09 local authority capital investment in CASE sectors increased in real terms in all regions bar one<sup>7</sup>. The fourth greatest percentage increase in CASE sector investment was in the South East, where local authority capital expenditure increased by 51% over the period; reaching approximately £132 million in 2008/09. In most regions Sports expenditure represents the majority of local authority capital spend<sup>8</sup>.

A significant proportion of capital investment in the arts in the region in both 2004/05 and 2008/09 was made on new construction as part of the arts facilities and activities funding stream. In 2004/05 this accounted for 61% of South East capital investment in the arts, and increased to 66% in 2008/09. The remainder of South East arts capital expenditure was on new construction as part of museums and galleries funding.

This pattern is typical of most regions, where new construction makes up the vast majority of investment, far exceeding that made in acquisitions. The region experienced an overall increase of 170% in capital investment in the arts between 2004/05 and 2008/09. This resulted in the South East having the highest capital investment in the arts when the nine English regions are ranked by actual expenditure.

Local authorities in the South East made the highest investment in sports capital assets, spending over £81 million in 2008/09. This was a 34% increase on 2004/05 expenditure. Most regions increased their expenditure over this period by at least 30%. The majority of South East expenditure in both years was on new construction of sports facilities (88% in 2008/09).

The South East increased expenditure on capital assets within its library services between 2004/05 and 2008/09 from £14.0 million to £16.5 million. Almost 89% of this investment in 2008/09 was on new construction. The remainder was spent on acquisition of capital assets within the libraries service.

### Top LAs for capital investment in new construction conversion & renovation by investment area in 2008/09

Investment Area	Local Authority	Investment £000s
Museums and galleries	Rother	1,412
Arts activities and facilities	Aylesbury Vale	10,380
Sports facilities	Cherwell	19,946
Library services	West Sussex	8,337

Source: DCLG, LGFS (2009)<sup>9</sup>

<sup>7</sup> Capital investment in CASE sectors in the North East reduced by 2% between 2004/05 and 2008/09.

<sup>8</sup> LA expenditure on capital investment only covers the arts (which includes museums and galleries), sports and libraries.

<sup>9</sup> Please note that there is no data available for heritage.

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## Tourism and Physical Assets

Data in this section is drawn from the Tourism and Physical Assets data tables available from the Regional Insights website. Key sources include:

- Visit Britain (VB), ONS International Passenger Survey (ONS-IPS)
- Enjoy England (EE), UK Tourism Survey (UKTS)
- Enjoy England (EE), Annual Visitor Attractions Survey via (AVAS)
- InterestMap (IM) Points of Interest (POI)

In both 2006 and 2009, the South East was the destination for 18% of domestic tourist trips, the second most popular region in both years. Domestic tourists to the region spent a total of £2.6 billion in 2009, a 7% increase when compared to 2006.

Visits to the South East by international visitors increased by 16% between 2004 and 2008, the second highest regional increase. Despite this increase, the South East's share of non-domestic visitors fell from 19% in 2004 to 17% in 2008.

Overseas visitors spent a total £1,800 million in the South East in 2008, representing 13% of expenditure that year. This was down from 14% of total overseas expenditure in 2004. However, there was an increase of 23% in the amount spent within the region between 2004 and 2008.

Overall, visits to attractions in the South East increased by 9% between 2004 and 2008, the largest proportional increase across all the regions.

The South East has a higher than average number of arts, sports and MLA physical assets per 10,000 people. The largest proportion of these assets are sports related (50%). This follows the national trend.

The number of heritage assets per 10,000 people in the South East (35) is higher than the England average of 21.

## Top 5 visitor attractions by number of visits 2008

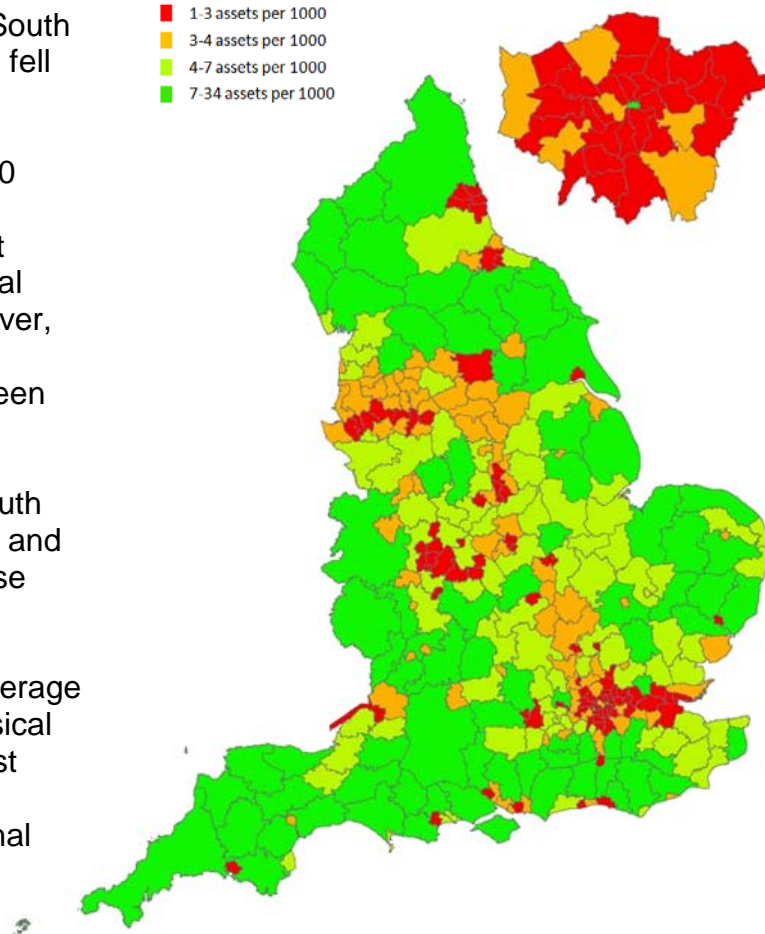
Attraction	Visitors (000s)
Canterbury Cathedral	1,004
Look Out Discovery Centre	615
Leeds Castle	580
Needles Park	482
Portsmouth Historic Dockyard	469

Source: AVAS, EE (2008)

## Density of all arts, museums, libraries, sports and heritage assets per head of population as at 2008/9

Source: IM, POI (2009)

- 1-3 assets per 1000
- 3-4 assets per 1000
- 4-7 assets per 1000
- 7-34 assets per 1000



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## Education

Data in this section is drawn from the Education data tables available from the Regional Insights website. Key sources include:

- The Department for Children, Schools and Families (DCSF, Research and Statistics Gateway (RSG), GCSE results in maintained schools by Local Authority
- Higher Education Statistics Agency (HESA) Students in Higher Education (SHE)
- The Data Service (DS) Individualised Learner Record (ILR)
- Arts Council England (ACE, Regularly Funded Organisations (RFO) Annual Submission Dataset
- English Heritage (EH), Heritage Counts (HC)
- Sport England (SE), Active People Survey (APS)

The total number of students studying a CASE related subject at GCSE level in the South East fell by 7% between 2007/08 and 2008/09. An 8% fall was experienced across England in the same time period.

In 2008/09, the largest proportion of CASE GCSE students (26%) in the South East studied a design and technology course, a similar proportion to the England average (28%).

The number studying a physical education GCSE fell by 9% between 2007/08 and 2008/09. History subjects experienced the smallest fall in the number of students, dropping by 4% in the South East compared with a 3% fall across England between 2007/08 and 2008/09.

Whilst the number of people studying a CASE related GCSE has fallen, these subjects have grown in popularity at higher education level in recent years. In the South East, the number of students studying CASE related subjects in higher education increased by 10% between 2004/05 and 2008/09 from 24,675 to

27,310. This compared to an increase of 13% across England.

In the South East in 2008/09, 75% of CASE students in higher education were studying arts, 14% heritage, 11% sports and 1% a museums, libraries or archive (MLA) related subject. In all these subject areas except MLA, more students were studying in 2008/09 than in 2004/05.

### Top 5 HEIs for number of students studying a CASE subject

University	Students (000s)
University for the Creative Arts	5,230
The University of Brighton	3,870
Southampton Solent University	3,445
The University of Portsmouth	2,915
The University of Sussex	2,175

Source: HESA, SHE (2008/09)

### Change in participation in CASE HE courses and average across all courses between 2004/05 and 2008/09

Course	Percentage change
Arts	11%
Sports	19%
MLA	-25%
Heritage	4%
CASE total	10%
All Higher Education	1%

Source: HESA, SHE (2008/09)

### Top 5 LAs for number of students achieving A-G in a CASE subject in 2008/09

Local Authority	Students (000s)
Hampshire	27.2
Kent	24.6
Surrey	19.5
West Sussex	14.8
Buckinghamshire	11.3

Source: DCSF, RSG (2009)

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## Engagement

Data in this section is drawn from the Engagement data tables available from the Regional Insights website. Key sources include:

- Department for Culture Media and Sport (DCMS), Taking Part Survey (TPS)
- Sport England (SE), Active People Survey (APS)

The proportion of people that had participated in a cultural event in the last year in the South East was 59% in 2007/08. This compared to the England average of 53%.

As with the whole of England, the proportion of people that had taken part in each type of cultural activity in the South East varied considerably. For example, whilst 73% of people had participated in literature activity in 2007/08, only 22% had participated in a craft activity.

In 2008/09, 17.1% of people in the South East took part in at least three sessions of moderate intensity sport per week. If recreational walking and cycling are included in the calculations this figure increases to 23%. The area with the highest percentage of sporting participants (including recreational walking and cycling) is the Vale of White Horse (29.5%), whilst the lowest is Medway (15.8%).

The percentage of people that had attended a sporting event (as a spectator) in the previous year rose from 15% in 2005/06 to 16% in 2007/08. This compared to 15% in England in both years.

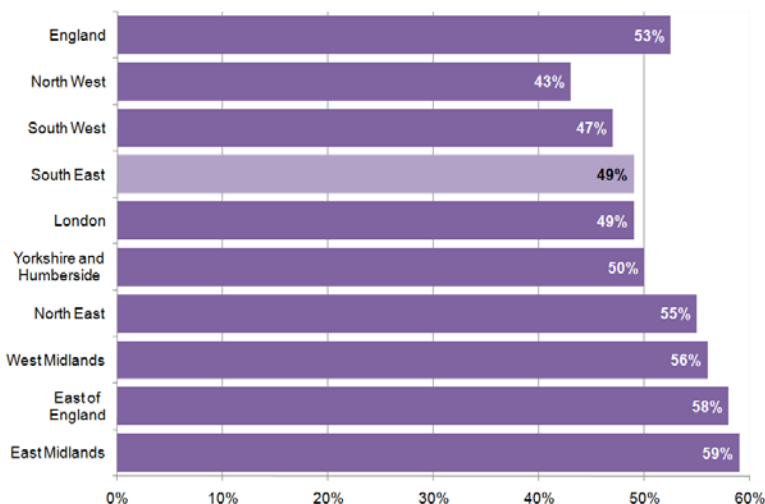
In 2007/08 attendances at archives (6%), libraries (49%) and museums or galleries (46%) were comparable to the percentage across England as a whole. However, the total number of attendances in both the South East and England fell between 2005/06 and 2007/08.

In the South East, 23% of people had attended a place connected with industrial history, compared with only 20% across England.

The percentage of people in the South East that had attended an arts event in the previous year in 2007/08 was 75%. This compared to 67% across England for the same period.

Attitudes towards arts activities rated on a scale of 1-10 scored an average of 7.9 in the South East in 2007/08. This compared to the England average of 8.0.

## The percentage of people that participated in a cultural activity in 2007/08, by region and compared to the average for England



Source: TPS (2007/08)

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## Community and wellbeing

Data in this section is drawn from the Community and Wellbeing data tables available from the Regional Insights website. Key sources include:

- Department for Communities and Local Government (DCLG), Citizenship Survey (CS)

Within the South East, 87% of those surveyed think that people from different backgrounds get on well together and 13% think that people from different backgrounds do not get on well together. The region had slightly higher than average agreement rates, with the average for England being 83% agreement and 17% disagreement.

The South East has the second highest rate of agreement with the statement that 'I have friends with different incomes to me', at 69%. All other regions had a percentage of agreement of 61% or higher and the average rate of agreement was 64%. However, the region has the second lowest rate of agreement with the statement 'I have friends from different ethnic groups to me': 41% agreed with the statement, compared with 52% for England.

People in the South East have a slightly lower fear of crime than the national average; 35% of individuals stated that they were worried about crime compared with the national average of 42%. The South East has the lowest percentage of regional respondents who are very worried about crime (6%).

The majority of individuals in the South East (76%) feel very safe or fairly safe walking alone in their neighbourhood after dark.

This is slightly higher than the national average of 73%. Only 10% of people in the region feel either very unsafe or never walk alone in their neighbourhood after dark, the same proportion as the national average.

When considering life in their neighbourhood, 76% of respondents in the South East felt strongly that they belonged to their neighbourhood. Approximately 11% thought that their local area had improved in the past 2 years, compared to 15% nationally.

Only 7% of people in the South East stated that they did not feel part of British society. Of those surveyed in the South East, 48% thought that the number of immigrants entering Britain should be reduced a lot, 29% thought it should be reduced a little and the remainder thought it should either remain the same or be allowed to increase. These findings are similar to the national average.

## The percentage of people that feel that they strongly belong to their neighbourhood in 2008/09, by region and compared to the average for England

Region	Percentage population
West Midlands	80%
North East	80%
North West	79%
East of England	78%
Yorkshire and the Humber	78%
South West	77%
East Midlands	76%
South East	76%
London	74%
England	77%

Source: CS (2008/09)

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