



East of England
All Party Parliamentary Group

Chair: Jess Asato MP

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Maximising the Tourism and Cultural Offer of the East of England

Background Briefing for the East of England APPG

Meeting from 4 to 5.30 pm on Monday 12th May in Committee Room 5

OVERVIEW

This briefing provides background information on both the tourism and the cultural sectors in the East of England. It has been compiled from information provided to the Secretariat by various partner organisations and is not therefore presented as a complete or final picture of every aspect of tourism and the creative sector across the region. It does, however, highlight some very important opportunities and challenges across the region and a number of key 'asks' which it is hoped the Minister will address at the meeting.

PART ONE – TOURISM

The visitor economy of the East of England – Norfolk, Suffolk, Essex, Bedfordshire, Cambridgeshire and Hertfordshire - is worth approximately £15bn per annum and employs more than 250,000 people. It plays a vital role in the overall economy of the region as well as its well-being, identity and sense of place

Recent news of a proposed Universal theme park and resort in Mid-Bedfordshire has put the sector in the spotlight. This will become the UK's biggest visitor attraction and represents a multi-billion-pound inward investment that will create an estimated 28,000 jobs.

One of the current largest visitor attractions is the Warner Bros Studio Tour: The Making of Harry Potter in Hertfordshire, which attracts 2 million people per year. However the visitor economy is generally made up of numerous smaller attractions and resorts and predominantly delivered by private sector SMEs.

The public sector also has a key role in facilitating the visitor economy by providing the conditions and services for the private sector to develop and grow for example transport links, clean beaches, good car parking, EV recharging points, walking and cycling trails. It is also directly engaged, for example, in museums.

There are a number of substantial challenges to the sector:

1. The sector generally has a narrative that it is 'seasonal, **low skilled and low paid**'. It is a sector young people go into before getting a 'proper' job.
2. **Recruitment and retention of staff** is problematic for businesses across our area. While this is a national problem, it is exacerbated in the East of England because of its rural nature and dispersed population, transport infrastructure (particularly for shifts) and seasonality. Brexit had an impact on staff availability.
3. **External connectivity** from some parts of the region is seen as poor – both in terms of direct rail links and major roads/motorways. Our airports have a primarily outbound audience and route offer.

4. **Internal connectivity** within parts of the region is also seen as poor – particularly in terms of public transport. Travelling within the region has its challenges.
5. **Seasonality of the offer**, as with other predominantly rural and coastal areas, is an issue. Spreading demand seasonally and geographically is a challenge but will deliver huge benefits if efforts can be made to achieve that.
6. The East of England has a **lower percentage of international visitors** than many other regions. This means a greater reliance on domestic audiences (although these are arguably easier to reach and have a lower carbon footprint). It is worth noting the Government's target is 50 million international visitors by 2030.
7. While **overtourism** is not necessarily seen as an overriding problem, there are areas where it does impact in terms of, for example, pressures on sensitive sites and disruption to wildlife, congestion and parking issues.
8. **Local Visitor Economy Partnership (LVEP) resource levels.** With the exception of Bedfordshire and Cambridgeshire LVEP coverage is good and a strength, but levels of resource and funding are mixed. The LVEPs for Essex, Norfolk, Suffolk and Hertfordshire work closely with the national tourism bodies VisitEngland and VisitBritain and also across the LVEP network. It is hoped Cambridgeshire will achieve LVEP accreditation in the Autumn.
9. **Competition from other destinations.** We have very strong competition for our key markets, in particular Devon, Cornwall, Yorkshire and the Lake District. There is a lower awareness of the East of England compared to others.
10. **Sizewell C** represents a challenge for Suffolk in terms of perceptions, construction disruption, pressures on the local labour force and competing demand for accommodation.

There are a number of opportunities for the sector:

1. Developing a **year-round visitor economy** would overcome the 'seasonal, low skilled, low paid' narrative and help drive the sector.
2. **Businesses with more money in their pockets**, would employ people full time, could afford to pay more and invest in upskilling.
3. **Social mobility is easy in the sector** and people with the right personality and application can progress quickly and have good careers.
4. **Soft skills** are often the most important traits in the sector – for many roles it doesn't take years in education, so employment can grow quickly if conditions are right. Nonetheless, better provision and representation for the visitor economy within the overall skills agenda and networks would help.
5. **The Treasury** generally sees domestic tourism as displacement - if you don't visit Norfolk, you might visit Cornwall - which doesn't increase their revenue. However increasing staycations rather than visits abroad – and more international visitors - would drive revenues for The Treasury.
6. Given Universal and Warner Bros Studios, world-renowned Cambridge, historic and heritage links to North America and Northern Europe in particular, and the region's overall tourism offer, there is huge **potential for growing inbound visitation**. Inbound tourism is Britain's third largest export and a big contributor to The Treasury. A direct carrier into Stansted from North America would be of huge benefit, as would raising awareness of the region through Travel Trade work.
7. **Destination Development Partnerships (DDPs)** in the East of England would bring collective working, particularly in growing international visitors who come throughout the year, stay longer and spend more money. There are currently two pilot DDPs, in the North East (a cluster of Visits Durham and Northumberland and the Newcastle Gateshead Initiative) and West Midlands/Birmingham. The former is funded by an award from Treasury, the latter using surplus funds from the Birmingham Commonwealth Games.
8. **Transport East's Global Gateway Priority** envisages upgrades to core road corridors (A12, A47, A14) and improvements to East-West rail routes, junction upgrades and better access from Stansted Airport.

PART TWO – THE CREATIVE AND CULTURAL SECTOR ACROSS THE EAST OF ENGLAND

A) Norfolk & Suffolk

The cultural sector in these counties is dynamic and collaborative. In Norfolk and Suffolk alone, it is estimated that the cultural economy, including commercial and funded organisations, freelancers and sole traders, turns over close to £300million each year. In parts of the region it is the fastest growing sector eg West Norfolk where across five measures (businesses, employment, GVA, productivity and specialisation), the Creative and Culture Sector was the best performing sector of the economy.

Key Facts About the Cultural Sector

- Consists of 1,250 businesses (2% of the overall business base)
- Supports 6,985 jobs (1% of all jobs across Norfolk & Suffolk)
- Was valued at £272m GVA per annum (the 4th highest of any sector)
- Saw 24% employment growth in period 2016-2021
- Is dominated by micro business with 95% having fewer than 10 employees. This is higher than the national average
- Concentrations of activity in Norwich, East Suffolk, Ipswich & West Suffolk
- Plays a significant role in supporting the development of the creative industries which encompasses a further 12,280 jobs and 3,325 businesses across Norfolk & Suffolk
- Average full-time workers earn £26,700 – 16% more than the average for the rest of the economy
- Participation levels have grown 2005/6 to 2018/19: Arts (+7%), Heritage (+11%) and Museums (+ 22%).

Norfolk Suffolk Culture Board

In Norfolk and Suffolk, the creative and cultural sector is uniquely underpinned by (NSCB), a diverse and inclusive body of sector leaders coordinated by Norfolk and Suffolk County Councils with a track record of success in leveraging funding for collaborative action that generates demonstrable place-based cultural, social and economic impact.

The NCSB works closely with creative industries and higher education and is a key driving force for our visitor economy. It works with external and internal partners to embed good practice, design social improvement, cement skills and employment, and leverage assets to attract new investment.

NSCB has published two strategies since its formation in 2012 – Culture Drives Growth (2015) and Culture Drives Impact (2022). Over this time, NCSB has established itself as an authoritative and highly-regarded sector voice both regionally and nationally. It has also proven its ability to deliver by attracting smart and impactful investment for major programmes of growth and change, including:

- £0.4 million for ‘Look Sideways East’ (2014 – 2018) and ‘Head East’ (2019 – 2023), major cultural tourism growth programmes
- £1.2 million for ‘Start East’ (2017 – 2020), business support for cultural economy growth programme
- £0.3 million for ‘Collaboration: Place: Change’ (2019 – 2023), a Leadership Programme for senior, developing and emerging leaders in the arts and cultural sector

Two new development streams are currently underway:

- Mapping Creative Health in Norfolk and Suffolk - a review of and development plan for Creative Health in the region. This will lead to the creation of an ‘Enabling Creative Health Plan’ for health partners, including the trailblazing of a new Creative Health Apprenticeship.

- Mapping of Environmental Sustainability expertise, skills gaps and funding sources in the region, leading to the development of a Culture 'Green Book' for the region and related talent accelerator pathway.

Some Conclusions

Whilst visitor numbers have largely recovered to pre-pandemic levels the sector continues to be negatively impacted by a series of further national and global events which have seen:

- Stand still or decreased funding from public bodies including local government and Arts Council England
- Increased competition for funding from trusts and foundations across the charitable sector as a whole
- Increased employer costs (eg uplift of minimum wage and NI contributions)
- Decrease in earned income due to impact of costs of living crisis on spending potential of audiences

Despite the current challenges presented to the sector the following still hold true:

- Culture plays an important role in supporting growth across the region with strong crossovers into other sectors of the economy (e.g. visitor economy, creative industries, higher education)
- Culture positively impacts on community resilience by building social cohesion
- The region has a range of well-established cultural locations, including Norwich and Ipswich, alongside a range of rapidly emerging areas in which cultural activity is starting to become more prominent e.g. Lowestoft, Great Yarmouth, King's Lynn.

At a pivotal point in time for the creative and cultural sectors nationally and in light of Norfolk & Suffolk being fast-tracked for regional devolution, NSCB makes the following two sets of policy recommendations in order to support our sector to thrive and, in doing so, support broader growth agenda and generate wider impact:-

NSCB National Policy Recommendations

1. Maintain an arm's-length national Arts Council as a funding body and development agency with a national strategy
2. Secure creativity as central in a new National Curriculum through the commitment of teacher time, training and resources
3. Put creativity at the heart of the National Adult Skills Agenda
4. Maintain current levels of tax relief and explore other similar national and local government reliefs for culture

NSCB Regional & Devolved Policy Recommendations

1. Advocate for the creative and cultural sector to be an investment priority and vehicle for place-based growth in the Norfolk & Suffolk Economic Strategy for Devolution
2. Ensure the new Mayoral Authority has clear structural accountability and leadership for Culture and an expert panel to support decision making
3. Make a Creative Skills offer a mandatory part of how devolved adult skills budgets are deployed regionally
4. Embed Creative Health as part of the fabric of regional health provision

Cross-cutting all of these recommendations is a rally call for any funding to the creative and cultural sector to be based on arms-length decision making and on a multi-year investment basis as the rule and not exception.

B) Cambridgeshire & Peterborough

Culture and tourism in Cambridgeshire and Peterborough are core drivers of inclusive economic growth and innovation. With population growth outpacing national averages, world-class knowledge assets, and a globally recognised creative and cultural cluster, this region has the potential to lead the UK in culture-driven regeneration, inclusivity, accessibility and export-ready innovation. Sustained investment and policy support are critical to unlocking that potential.

Key Facts

- **Fastest-growing cities** - Cambridge's population rose by 17.6 % and Peterborough's population grew by 17.4% between 2011-2021
- **Visitor** - An average of 26m tourist trips a year (2017-19) across the Combined Authority area; 96 % are day-visits, indicating significant untapped overnight value.²
- **Tourism jobs** - Employment in tourism and hospitality in the CPCA area grew c.23 % 2010-19 out-pacing overall jobs growth.³ 74,505 people are employed in tourism across the region, representing 10.4% of the total employment for the area.
- **Tourism Businesses** - The region has seen growth in small businesses, including those in the tourism sector.
- **Visitor Spend** - During 2017-2019, visitors to Cambridge spent an average of £47.13 per day, while in Peterborough the spend was £36.99. The national average is £53.45.
- **Accommodation** - 1.8m room nights annually across the region with 3,955 hotel rooms in Cambridge and South Cambridgeshire in hotels with 10+ rooms.
- **Creative powerhouse** - More than 2,900 creative & cultural businesses employ c.30,000 people locally, with GVA per job 30 % above the UK average.⁴
- **Multiplier effect** - Every arts job supports 1.65 further jobs in the wider economy.⁵
- **World-class knowledge assets** - University of Cambridge contributes £29.8bn GVA & 86,000 UK jobs, anchoring a global creative-tech cluster.⁶ Anglia Ruskin University (ARU) is an innovative global university with students from 185 countries and Times Higher Education University of the Year 2023. ARU is defining a model aimed at addressing the advanced skills needs of the region's knowledge-intensive and creative industries.

Local delivery plans

- **Peterborough UK City of Culture 2029** bid – seed-funded by CPCA & PCA.
- **Cambridge Arts Theatre** - £20m redevelopment (Gatsby Trust funded) confirmed and further £20m being raised for a new 200-seat studio.
- **Cambridge Junction** - £55m transformation project and the largest cultural capital project in the East of England; outline business case in 2025.
- **Wysing Arts Centre** - £500k transformation towards greater accessibility, green energy and biodiversity, funded in part by CPCA.
- **Fens Reservoir** – significant infrastructure project with added benefit for region as a major culture and tourism destination

Alignment with Government Priorities

- **Growth - Culture-led growth corridor:** Cambridge to Peterborough through Fenland to Norwich
- **Cambridge as an AI hub:** Cambridge is the top location for AI companies in the UK; potential for AI focused Creative Cluster/Corridor that supports interdisciplinary collaboration between the cultural and creative industries around AI, to deliver UK wide benefits.
- **Creative Industries Sector Vision (Jun 2023)** - Screen & immersive cluster; R&D-intensive creative tech

- **Destination Management Review / LVEPs (2024+)** - Regional Cambridgeshire and Peterborough LVEP to pilot day to overnight conversion
- **Regenerative Tourism** - Retrofit heritage assets and update existing cultural facilities towards a zero carbon future; low-carbon visitor transport
- **Skills for Growth White Paper (2024)** - Creative Skills Guarantee & devolved adult skills programme

Opportunity Themes 2025-30

i) Grow the Sector

- **Fuse culture, R&D and tech** to create an export-ready screen-and-immersive super-cluster; leverage UK Government's Creative Industries Sector Vision (£50bn GVA, 1m jobs by 2030).
- **Double overnight stays by 2035** through a Cambridgeshire & Peterborough LVEP: joint positioning, integrated ticketing and sustainable transport links. Support and promote night-time culture with curated/signposted cultural journeys for visitors across the region.
- **Embed culture and the visitor economy** in the CPCA integrated settlement (from 2027/28), including fiscal levers and a clear Net Zero tourism plan.
- **Ensure a world-class cultural offer that is accessible** and supports development of new communities and ambitions for growth and economic development. (Response to Case for Cambridge)

ii) Transform Skills & Access

- **Prototype Creative T-Levels**, Higher Technical Qualifications and a Creative Health Apprenticeship; align with CPCA devolved skills budget.
- **Expand Access to Creative Education** in and out of school to reach young people in underserved areas, building confidence, creativity and career pathways.

iii) Future-Proof Infrastructure

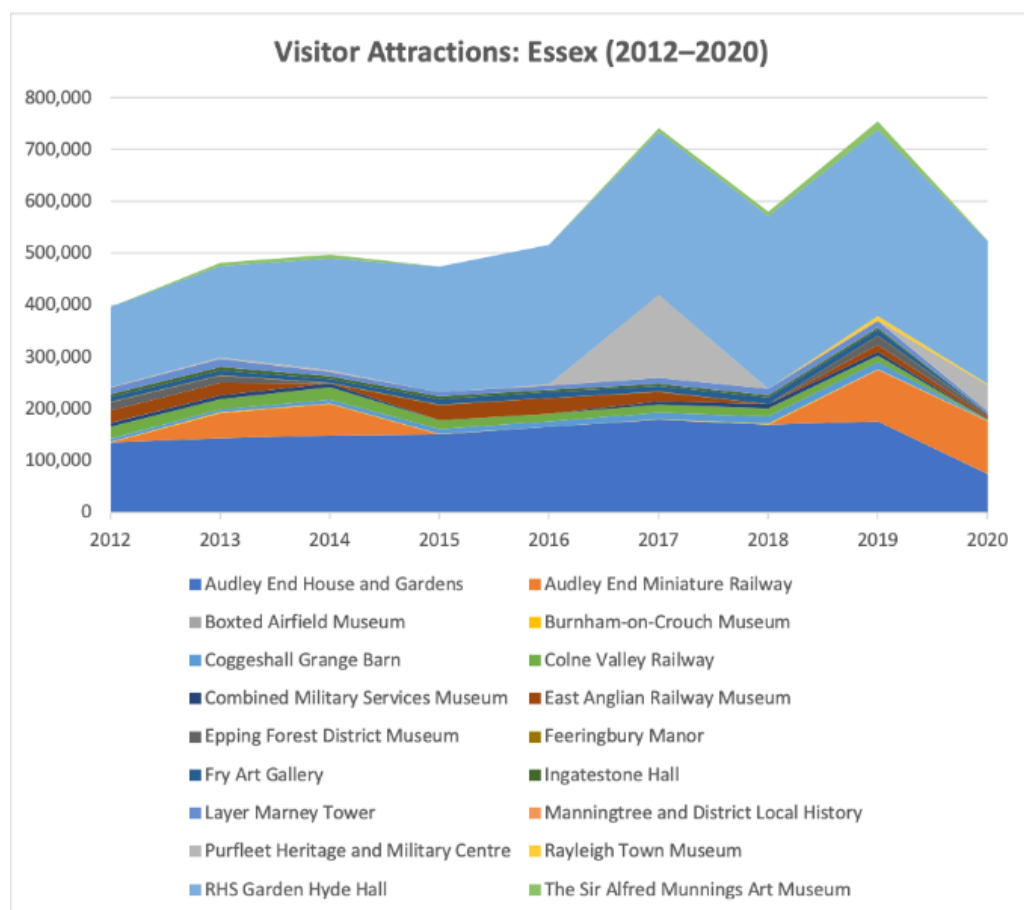
- **Unlock £25m Cultural Infrastructure Fund** (public £10m / private £15m) to upgrade venues, tackle crisis in affordable artist studio provision and grassroots activity, back business model innovation, carbon-proof heritage sites and develop digital production studios.

Key policy asks

- **Arts Council England** - Confirm long-term funding settlement & retain arm's-length status. Increase funding/investment to support growth in ambition and quality, national and international touring (both import and export), festivals, and new creative health and community programmes.
- **Curriculum Reform** - Guarantee weekly creative entitlement for all pupils across primary & secondary phases, delivered in partnership with cultural organisations.
- **Establish a UK Cultural Investment Partnership Fund** that supports at-risk non-profits; supports business innovation including risk-taking, income diversification and partnerships with health and education providers; matched capital and endowment funding to support the development of affordable studio space and decarbonisation.
- **Fiscal stimulus** - Extend VAT cultural exemption to festivals and learning programmes; pilot rural creative workspace rate relief. Create a Grassroots Visual Arts Fund.
- **Restore Specialist Subject Funding for Creative Subjects** in Higher Education to protect high-quality creative courses requiring industry-standard facilities, essential for the future workforce.
- **Tourism Transformation Fund** - Resource a Cambridgeshire pilot focused on day-to-overnight conversion, data analytics & green mobility.
- **Creative Skills Guarantee** - Ring-fence devolved Adult Education Budget for creative SMEs; fund regional talent acceleration hubs.
- **R&D Tax Relief** – Classify immersive content R&D under enhanced credit; simplify cross-sector collaboration claims.

C) Essex

Essex has a thriving, proactive and vibrant artistic scene, with a network of interconnected hubs and organisations which work together across the county. The county has produced musicians, actors, dancers and presenters that have achieved worldwide acclaim and brought in billions of pounds of revenue to the UK; Blur, Olly Murs, Sade, Jamie Oliver, Alison Moyet, Sam Ryder, Dermot O'Leary and Dame Maggie Smith to name a few. It also has a number of significant visitor attractions.



Culture Essex

Culture Essex was launched by Essex County Council (ECC) in 2023 and brings together sector leaders, advocates and artists to achieve the 'Everyone's Essex' plan, focussing on Renewal, Equality and Ambition. Culture Essex has demonstrated both the breadth of provision, but also of income generation, social health, national impact, employment opportunities and long-term benefits made by the cultural organisations across the county.

In 2023 Culture Essex delivered a Cultural Strategy document to create a manifesto for arts and culture in Essex. Across the UK we know more than one in eight businesses are part of the creative industries and bring in £115.9billion annually – more than the life sciences, automotive and aerospace industries combined. In 2023 ECC committed over £1.5m to supporting arts and culture.

Culture Essex also commissioned Deepa Naik to create a report on 'Mapping Creative Hubs' in Essex in 2023 – finding that 88% of these hubs (which could be theatres, art galleries, dance studios or arts centres) actively focus on skills development and education, with 94% focussing on cultural impact through the creation of new work and growing networks – contributing to the future creative businesses of tomorrow.

Essex's Cultural strategy notes that cultural organisations have a part to play bridging the gap between education, skills and employment. Working in partnership, arts organisations across the region create opportunities in training, internships and skilled employment.

Creative Lives

Creative Lives was a study commissioned by Essex County Council, and conducted research released in March 2025 on the creative health landscape across Essex. It built on the findings of other National health surveys including a study by King's College London detailing statistical evidence the arts reduced postnatal depression, improved motor function, decreased pain and improved non-motor symptoms of Parkinson's and strokes.

At a crucial time for the thriving Essex arts economy to continue its ability to contribute to the national cultural, wellbeing and economic landscape, organisations from Culture Essex come together to make the following policy recommendations in order that our sector can continue to prevent NHS spending, create widespread employment and generate significant income, and continue to contribute to the UK's world leading artistic reputation:

National Policy Recommendations

1. To continue, invest in and preserve the Arts Council as a specialist and objective funding body
2. To put creativity, the arts and theatre at the centre of education in schools and colleges, with exam options in creative subjects widely available to young people of all economic backgrounds
3. To invest in the artistic and technical talent development pipelines of organisations to continue to feed the world leading artists the UK produces
4. To maintain or improve current levels of tax relief to allow creative organisations to thrive, prosper and share their work widely on the world stage.

Regional & Devolved Policy Recommendations

1. To recognise culture as a key asset in creative health, economy and growth, and as a vital tool in the cohesion of new geographic alliances.
2. Ensure the new Mayoral Authority has clear commitment and responsibility to maintain and grow the thriving cultural sector, and recognises long term investment is needed to facilitate the sustained economic growth and talent development the county has seen to date.
3. To recognise that the arts produces not only performance, but also education, training, rehabilitation and prevention, and for policy makers to actively be aware of the holistic impact the arts has across health, employment and education.
4. Embed Creative Health into funding and strategy for regional health long term.

With thanks to:

- *Pete Waters, Visit East*
- *Owen Calvert, Norfolk and Suffolk Culture Board*
- *Matt Burman, Create Cambridge & Cambridge Junction*
- *Deborah Sawyer and Natasha Rickman, Mercury Theatre, Colchester*

APPENDIX - CASE STUDIES

StartEast - a bespoke business development programme for creative enterprise across Norfolk and Suffolk running from May 2017 to September 2019. This ground-breaking economic development initiative responded to the importance of this sector for the economy (estimated 5,815 jobs in Norfolk & Suffolk – higher than the national average) and the specific challenges.

Working across a largely rural geography with a poor track record for enterprise and business formation the programme was designed by the sector for the sector - providing support to over 360 small/medium creative enterprises and enabled a significant step-change in the capacity, ambition, impact and economic contribution the regional creative sector. Evaluation data showed:

- 90% of respondents now had a clear vision of their business goal
- 62% increase in average annual turnover of participating creative enterprises
- 50% increase in productivity reported across participants
- 75% of respondents had diversified income by launching new products or services

The programme had a budget of £1.17million derived from funding from the European Regional Development Fund (£609,773) and Arts Council England Creative Local Growth Fund (£500k), Norfolk County Council (£39,000) Suffolk County Council (£25,000) and the New Wolsey (£49,000).

National Centre for Writing (NCW) – NCW was established in 2003 and is unique in the UK: a literature house dedicated to writing and writers, based in a Grade-I listed medieval trading hall (Dragon Hall), rooted in Norwich and open to the world. Their programmes and partnerships operate from the local to the international.

NCW is the focal office for Norwich's UNESCO City of Literature; the cities of literature network today comprises 53 cities across 6 continents, through which Norwich is shared on the world stage. It is the Regional Literary Development Agency for Arts Council England working across the east of England with writers & translators.

NCW have worked from Dragon Hall since 2015, leveraging significant investment, support, and artistic and community loyalty to animate a major structural asset (built in 1427) for today's artists, audiences, readers and participants. Where once were traded textiles and spices, today stories, words and ideas are exchanged. Annually, they host 10k+ in person and 400k+ digital audiences, 8k e-learning participants and over 350 artists.

NCW is an anchor organisation and asset in the city and region, which, alongside peers (including their tenant and collaborator Creative Arts East), drives and supports sector leadership and development, via programmes such as Transforming Leadership: Collaboration Place Change, and the International Literature Exchange.

First Light Festival, Lowestoft - a free access, multi-arts and science festival. The only free beach festival in the UK. Since its launch in 2019 First Light has been a catalyst for cultural regeneration in Lowestoft, the second largest town in Suffolk, breathing new life into the tourist economy, impacting visitor numbers, increasing local spend and reframing Lowestoft as a gem in the East of England tourist offer.

First Light:

- attracts 40K+ audiences each year

- gives 1000+ creative practitioner and freelance opportunities/roles each year
- supports 120+ volunteers per festival with 30% of volunteers under 24yrs
- enables 54 regional/national partnerships working with 22 schools, the FE colleges and universities

Recent development milestones:

- 2022: took on management of the East Point Pavilion delivering programmes of cultural enterprise development and targeted cultural engagement activities for children and adults facing or at risk of isolation
- 2023: secured ACE regular core funding, knitting Lowestoft into a national portfolio of cultural organisations.
- 2024: Place Partnership project for Lowestoft as the lead of the Battery of Ideas – a consortium of 16 local, regional and national cross sector partners developing Lowestoft’s new cultural quarter as a creative hub, due to open in 2026.
- 2025: working cross-sector to maximise cultural benefit for Lowestoft as part of the ‘Energy’ coast, including as the Producer for Sizewell Creative, part of the Sizewell C project.

Peterborough Cultural Alliance - co-authored the city’s 10-year cultural strategy; leveraged CPCA support to secure a £667k ACE Place Partnership award.

Create Cambridge – a new cultural compact led by cultural organisations in partnership with University of Cambridge, Anglia Ruskin University, Arts Council England and Cambridge City Council; 10-year cultural plan publishing Dec 2025, with the ambition for this to be underpinned by £1m innovation fund for community-led commissioning.

Mercury Theatre, Colchester – an award winning regional producing theatre, currently employs 103 people, 2 apprentices and 1 bespoke technical placement. 20% of the Mercury’s £5 million turnover comes from public sector grants (ACE, ECC and CCC) with the other £4.4 million earned through ticket sales, bar, catering and merchandise sale and fundraising. The Mercury costs each Colchester residents approximately 87p per year. The theatre’s recent refurbishment brought in £9.5 million of new investment into Colchester.

The theatre’s ‘[Mercury Creative](#)’ programme delivers training to enable Essex and Suffolk based residents to build and maintain a sustainable career in the arts in the region, nationally and internationally. The pilot Mercury Creatives programme welcomed 112 beneficiaries, created 124 new jobs and brought over £2.2 million of new investment into creative industries in the region as a direct result of creative and business support from the programme.

Colchester Arts Centre - a thriving music led community arts centre. Data reveals that there is significant cultural tourism operating on the live music scene, as audiences will travel nationally to follow bands and artists they particularly admire. With a turnover of £1 million the venue demonstrates how public investment (18%) can bring huge returns in terms of capital returns.

Report compiled by Steve Barwick, Director, East of England APPG Secretariat

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