West of England Cultural Strategy

Phase 1: Regional Evidence Base

Summary Report

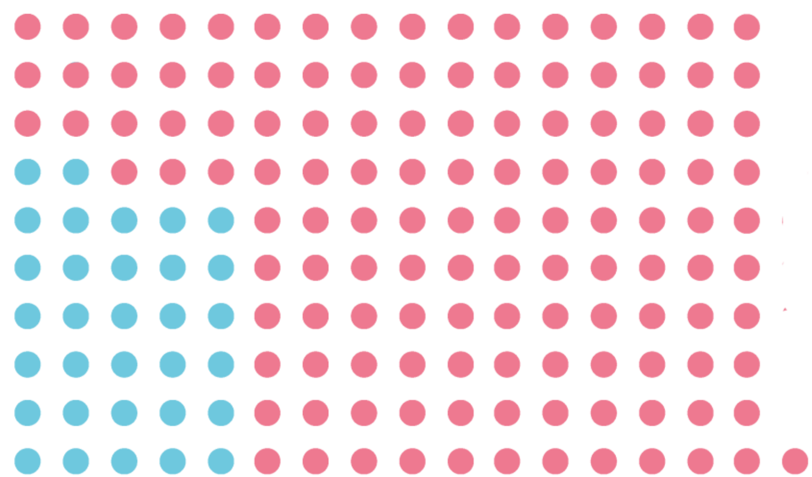
FEI

This report is the culmination of Phase 1 to 'establish a regional evidence base of cultural assets and activities'

The research ran from November 2018 to February 2019

It was developed through:

- Foundation research – including region-specific data, broader national/ regional strategies and emerging trends
- Cultural Mapping – of assets and agents 500+
- Stakeholder Consultation – 32 conversations
- Sector consultation – 4 sector workshops attended by 129 people



Context: West of England

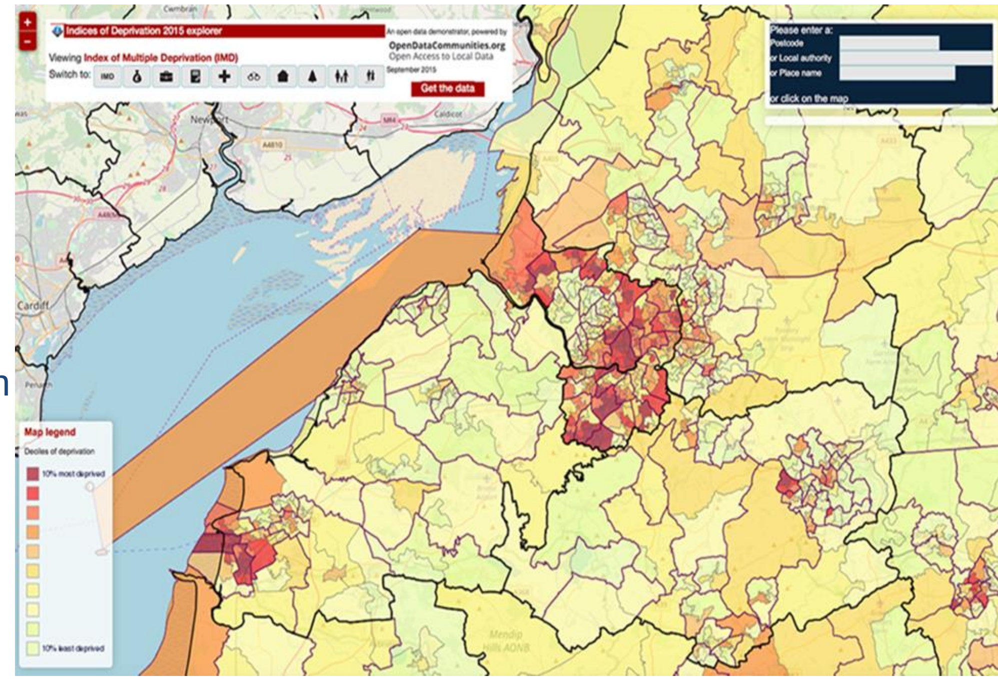
Population

Rapidly growing population with diverse mix of settlements and landscapes including urban, rural and coastal

Weston-Super-Mare will have 10,000 new homes within the next 10 years, projecting it to be the second largest conurbation by population

Age profile relatively balanced across region as a whole, but projected to have increasing % of older people

The WofE has a number of areas which fall within the 10% most deprived nationally equating to some 83,916 people or 7.8% of the WofE population



IMD 2015

Key Points

- **Diversity in where people live – cities, towns, rural areas**
- **Emergence of new communities**
- **Pockets of deprivation**

Context: West of England

Creative Economy

Exemplar 'modern economy'

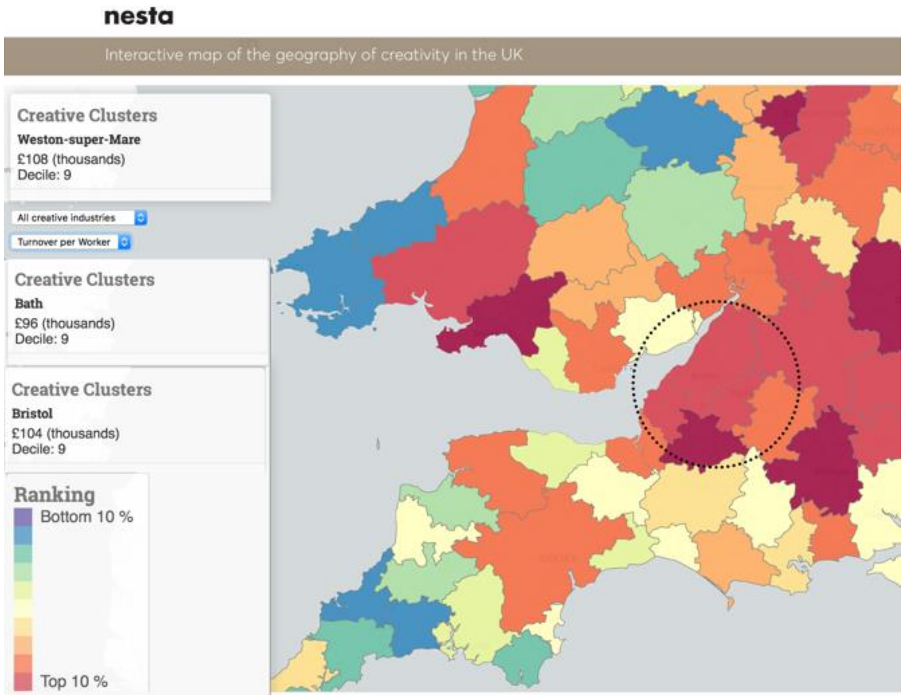
Recognised Creative Cluster with Bristol defined as a 'Challenger Cluster'. Estimated £638m to the local economy generated by 6093 businesses (CN,2108). Data shows equally productive creative businesses across the WofE region

Universities have played a key role in the growth of this sector through investment in innovation

Significant Bath- Bristol creative tech cluster fuelled by University partnership

Film and TV sector 3rd most significant in the UK, Bristol's live music generates £123m pa

Tourism is a strong sector for WofE but room for growth and exchange. Total overnight trips in 2015/17: 2,628,000 generating £523m



NESTA Geography of Creativity 2016

Key Points

- **Exemplar modern economy**
- **Creative Cluster**
- **High productivity equal across the region**
- **Evidence of successful intra-regional collaboration**
- **Significant 'creative / cultural' sectors**
- **Strengths in tourism offer**

Context: West of England

Heritage

Bath is a World Heritage Site and with significant international reputation and high numbers of listed buildings and parks. B&NES Heritage Services generates profit

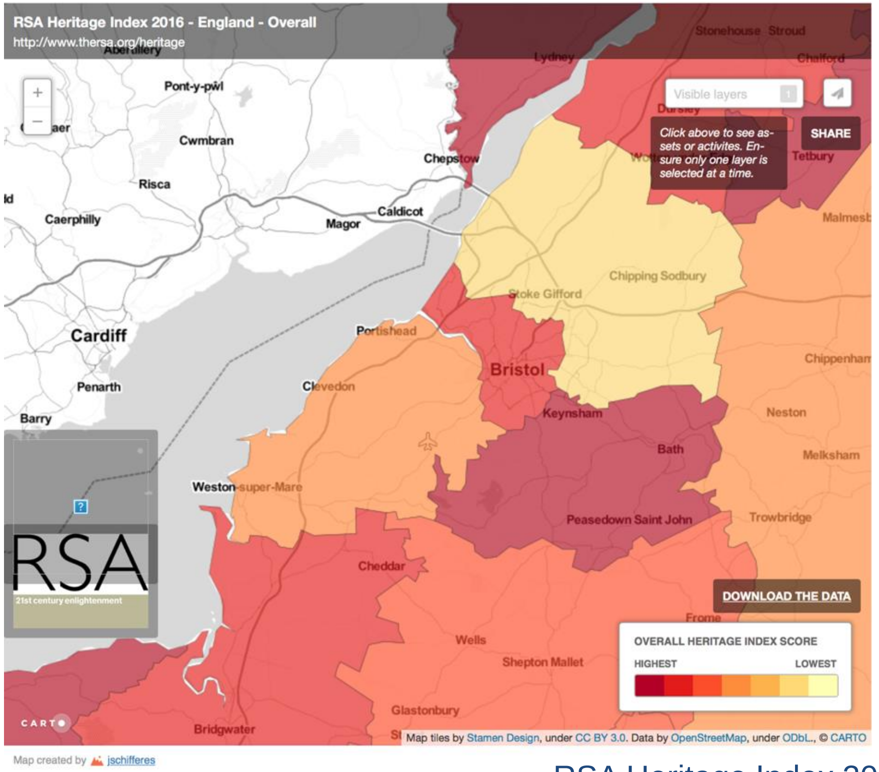
Arts and cultural organisations play a significant role in animating built heritage as part of place-making activities

Exceptionally rich industrial heritage narrative across the region

Weston-super-Mare Heritage Action Zone

Social heritage also linked to cultural leisure experiences

Highly valued natural heritage contributing to high levels of reported quality of life



RSA Heritage Index 2016

Key Points

- **Bath leads in physical assets: Bristol in activities**
- **Arts/ Cultural organisations play a significant role in animation of historic areas**
- **Industrial heritage a regional strength**

Context: West of England

Public Investment

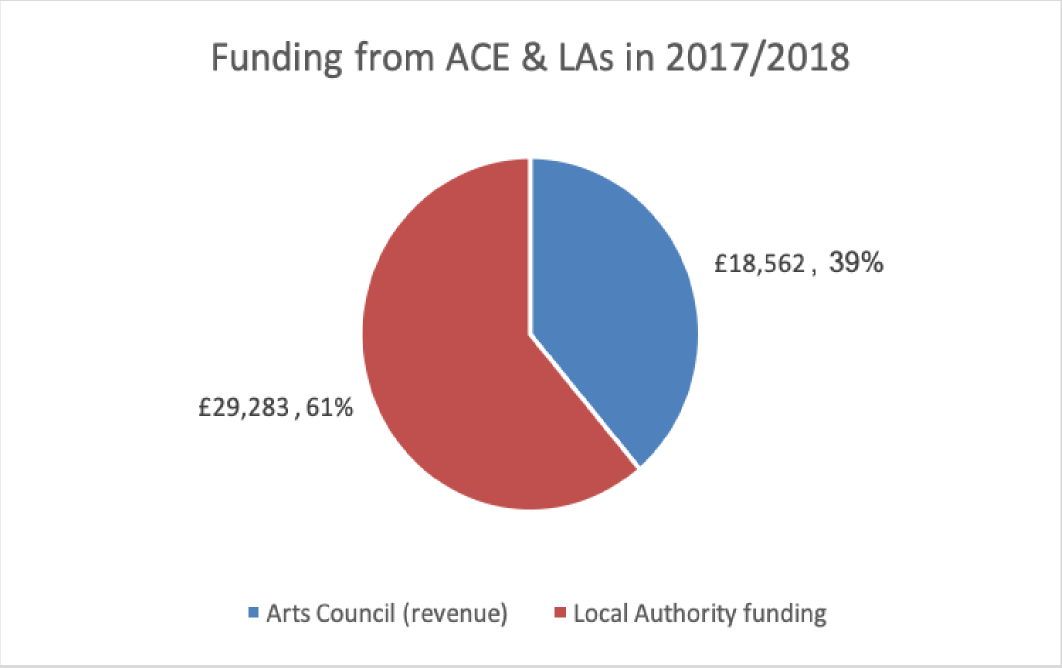
Direct spend from four LAs in the region on Culture and Heritage activity in 2017/18 was £29.3m – with additional £15.7m on Tourism & Libraries

All LAs are involved in culture delivery (e.g. run their own venues, festivals, music and arts service)

Significant cuts over recent years especially the last 18 months (approximately £2m)

In 2017/18, ACE invested £18.6m into arts and cultural activity and a further £9.8m into capital

ACE current NPO Portfolio (2018-22) is 24 organisations with a total investment of £29.8m over 4 years



Key Points

- **LAs are the largest funders of arts and culture activity**
- **LA budgets are declining**
- **ACE is investing £29.8m into core cultural organisations in current NPO round to 2022**

What is distinctive about the West of England in terms of culture

Exceptionally diverse cultural ecology with a very high level of freelancers moving across commercial, community and cultural activity

Many nationally and regionally significant cultural agents across all genres and practices (performing arts, music, visual arts, design, cinema, heritage, attractions). Libraries play this role in under-served locations

Very high level of networks essential to the flow of talent and ideas through the system (dataset: 47)

Exceptional and distinctive cultural 'hubs' that provide an anchor for growth

The Universities play a pivotal sector role via high value research, investment and knowledge sharing

Creative technology a particular and growing distinctive strength with a number of nationally significant projects underway

Cultural activity and assets with un-tapped potential and opportunity for growth

Areas of existing strength and good practice, where there are a number of significant opportunities regionally and nationally

Physical Place-making:

- Strong history and track-record of re-purposing industrial spaces for permanent & temporary use
- Investment in animation activities for Town Centres and high streets could be arts-led
- Community centres in new developments may be suitable for cultural tenants and custodians
- Landmark 'hub' buildings can drive wider place-making agendas – for example Tropicana

Live Music:

- The live music sector is growing nationally
- Colston Hall plans – particularly around young people
- Lively independent music scene
- Requires policy change rather than investment

Areas where activity is complementary across the region

There are a very high number of festivals and events across the region. Dataset 97

- Take place across the whole of WofE region
- Very diverse in scale and scope
- Dynamic – with some very longstanding (50years+) and some very new
- High level of festival creative and technical production skills in demand nationally and internationally
- An existing network Festivals Network, although currently city-based

Areas where there is opportunity for further collaboration/promotion

There are areas where there are pockets of exceptionally good practice that have not yet been brought together or rolled out across the region

Cultural tourism:
- Strong sector for growth learning from Bath's success
- Success of B+B Cultural Destinations
- Excellent cross-sector partnership working
- Treating residents as cultural tourists is a success (Discovery Card)

Cultural Education:
- Strong FE/HE education offer
- Bristol Music Hub and Cultural Curriculum

Creative Talent:
- Good examples of sector-led post-16 talent development focused on inclusivity

Creative Enterprise Support:
- Lots of business support but not always fit-for-purpose
- Network for Creative Enterprise has demonstrated need and distinctive support model.

Potential growth areas, considering national trends

The WofE has a number of potential growth areas including the following, which reflect national trends:

Nationally and internationally recognised expertise in cultural creative technology

- Recognised existing Creative Cluster(s) with high levels of productivity
- Universities – individually and collectively – support innovation and R&D especially in Creative Tech

Place Making and Quality of Life

- High reported levels of Quality of Life linked to access to natural and cultural assets
- Quality and diversity of festivals and events across the region

Inclusive leadership, talent and participation

- Exceptional good practice, not always joined up
- High number of significant cultural hubs, helping to anchor the flow of talent and ideas, built and sustained over a long period of public investment
- History of social enterprise innovation
- Arts and Health has future potential with particular challenges across the region especially ageing population

Key links to the emerging West of England Local Industrial Strategy

Arts and culture can help with **inclusive economic growth** and creating **a higher quality of life**

Three themes linked to WECA's strategic objectives :

- **Skills:** Creativity and Talent. Connecting Talent and Innovation Pathways – hubs and networks, technology, cultural education through to creative leadership
- **Business:** Thriving Creative and Cultural Enterprises – business support, cultural leadership, integration of 'commercial' operators
- **Infrastructure:** Constant Cultural Offer – including place-making (hard and soft)

The overall opportunities and benefits of investing in the cultural sector

Inclusivity

Established good practice in the cultural sector (Creative Case)

Community links and empowerment through culture

Reaching untapped talent and markets

Diversity is linked to innovation in creative sector

Economic Growth

Direct sector growth - the current value of the Creative Sector to the UK is £101.5bn

Innovation – artists can help drive new ideas and add value

Direct spend on services

Spill-over effects into other sectors – for example retail, leisure, tourism

Visitor spend – culture drives higher value tourism and encourages longer stays

Savings – culture can ease pressure on other budgets (health, adult social care)

Quality of Life

Place-making through animating shared public spaces

Place-making through making locations more attractive and authentic

Culture can foster and help express local and civic pride

Cultural activities can help promote health and wellbeing

Creativity promotes self-actualisation which helps encourage further self-development

The limitations for the growth of the cultural sector and potential mitigations

Limitations	Mitigations
Diversity of the sector with high number of freelancers can be difficult to engage with	Investing in hubs and networks to maintain the flow of talent and innovation through the system
A fast-moving sector means good practice and talent is sometimes lost	Improved communication across the sector coalescing around agreed outcomes and targets
Charitable organisation structures are not always fit for purpose	A tailoring of business support to suit values-led and social enterprise models
Conventional forms of public funding are in rapid decline	Exploring alternative funding and investment strategies
Over reliance on volunteers across the sector	Shared evaluation metrics and methodology
Highly competitive place-based cultural agenda	A single vision for culture in the region with a clear strategy and action plan
Complexity of stakeholders and funders not always as joined up as it could be	Closer working between place-partners and funders

SWOT: Strengths

- Recognised existing Creative Cluster(s) with high levels of productivity
- Universities – individually and collectively - support innovation and R&D especially in creative tech
- Nationally and internationally recognised expertise in cultural creative technology
- Exceptionally strong film, tv and tech sector ecology
- Highly educated, skilled, diverse and flexible talent pool
- High number of significant cultural hubs, helping to anchor the flow of talent and ideas, built and sustained over a long period of public investment
- History of social enterprise innovation – for example repurposing buildings - and community arts
- Quantity and diversity of festivals and events across the region
- Bath's cultural heritage is internationally recognised and generates a surplus
- Strong industrial heritage narrative across the region based on creative innovation (Bristol, S. Glos)
- Strong social heritage narrative based on pleasure and leisure (B&NES, North Somerset)
- High reported levels of quality of life linked to access to natural and cultural assets
- Commitment to inclusion from all stakeholders
- Investment in the cultural sector by LAs and ACE

SWOT: Weaknesses

- Pockets of socio-economic deprivation across the WofE and particularly in urban areas
- High levels of isolation and rapidly ageing rural population not able to access cultural infrastructure
- Transport and connectivity across the WofE region
- Investment in physical place-making not always accompanied by resources into ‘soft’ place-making through animation and activities
- Freelancers more difficult to engage with… and to count
- Seasonal and project-based work can often be overlooked in standard economic growth measurements
- Over-reliance on volunteers for much of cultural activity at all levels
- Focus on ‘DIY’ approach can mask inequality of access to opportunities
- Communication of cultural opportunities and offer is fragmented
- Excellent place-based partnership working often does not reach across the whole of the WofE
- Licensing and permissions processes inconsistent from place to place

SWOT: Opportunities

- Exemplar modern creative economy suited to further research into inclusive growth
- National policy and resources support distinctive strengths and opportunities in creative tech, place-making, live music and inclusion
- New housing developments will create new communities and provide opportunities for economic growth in retail and leisure
- An already strong intra-regional cultural tourism partnership (B+B Cultural Destinations) provides a platform for further growth
- Strong FE/HE offer – potential to link more effectively to the Creative Sector
- An enterprising region supported by extensive business support which could offer more tailored support learning from the Network for Creative Enterprise
- Opening of Colston Hall as a regional centre for youth music
- Funders and stakeholders could work more closely on joint planning and resourcing
- Strong international links of communities and sector could be levered for export and growth
- Community arts and socially engaged artist networks could help reach deep into excluded communities helping with inclusive growth

SWOT: Threats

- Economic fragility of cultural hubs who play a critical role in the eco-system; triple-threat of higher costs, increasing demand and cuts to public funding
- ‘Heating’ residential and industrial property market threatening new, potential and existing cultural hubs
- Continuing pressure on LA budgets means potential for further cuts to the sector
- ACE funding is often levered by LA support which means a double-threat to core and activity funding
- Lack of consistent outcomes-based evaluation means the value-narrative of the sector can be confused and under-evidenced
- There is not yet an ambitious vision or strategy for culture in the West of England and this makes partnership working and distributed leadership difficult and ineffective