West Midlands Cultural Sector Analysis

June 2021

by

Hatch

We Made That

Tom Fleming Creative Consultancy

Acknowledgements

The research commissioners would like to thank all the people who have guided and advised us on the development of this project, as well as engaged with the research & mapping activity through sharing their knowledge and experiences.

We owe a particular debt of gratitude to the arts and cultural organisations participating in our research – thank you for your time and patience. We also greatly appreciate the support from Arts Council England and the Department for Digital, Culture, Media and Sport for making this work possible.

This file may not be suitable for users of assistive technology. Request an accessible format by contacting us - wmca.org.uk/contact-us

Supported using public funding by ARTS COUNCIL ENGLAND

Contents

Forewords

Andy Street, Mayor of the West Midlands

Creativity is the driving force of our region. It is reflected in our rich heritage, our diverse cultures, and our entrepreneurial spirit. Our world-class arts & cultural sector is at the core of this, moving us forward, shaping our identity and nurturing the next generation of creative talent. Art & culture help to strengthen our society, bringing communities together, inspiring our young people, and making places more attractive for residents, visitors, and investors.

Covid-19 pandemic has, however, had a devastating impact on the sector. In many cases its reliance on human interaction, seasonal operating hours and flexible employment has left it particularly vulnerable. This research, initiated by our excellent Cultural Leadership Board, provides us with the evidence base to enable the sector's recovery. The research has allowed us to comprehensively map our cultural assets across the region, giving us a full picture of the sector's strengths and weaknesses.

It also exposes the challenging relationship between access to cultural assets and factors like health, wellbeing, and skills development – something I am determined to address in my second term as Mayor. But crucially, it shows how the sector's creative energy can drive the recovery of the region as a whole. I look forward to working alongside partners to act on these findings and grow our arts and cultural sector over the coming years.

Martin Green CBE, Chief Creative Officer, Birmingham 2022 Commonwealth Games

Creative cities are great cities: Fact! Large scale creative festivals are good for cities, be it European City of Culture in Glasgow or Liverpool, UK City of Culture in Hull, and currently Coventry. On a bigger scale still, the Cultural programmes of London 2012 and the 2014 Glasgow Games bought millions of people together over and above traditional audiences for sport. The Birmingham 2022 Commonwealth Games will also be milestone moment for city and region.

It all starts with understanding audiences and the unique research within these pages will ensure the Birmingham 2022 Festival will act as a catalyst for real change, in a way that has not been possible before. Our aspiration is that the festival becomes a transformational moment for the sector strengthened by a plan to create a new 10-year cultural strategy that is region-wide. This will be another first that will test the commitment, generosity and vision of our councils, funders agencies, arts organisations, and arts professionals.

We want to use 2022 to ignite a revolution in the perception and status of Birmingham and the West Midlands as a creative place, changing national and international perceptions, increasing tourism, investment, ambitions and pride in place - inspiring creativity and change, long after the last medal is won.

Symon Easton, Head of Cultural Development & Tourism, Birmingham City Council

Birmingham City Council is proud to have supported this important research. It will help inform our future direction in regards to the planned 'Our Future City Plan' and new Cultural Strategy through the Birmingham Cultural Compact.

Martin Sutherland, CEO of Coventry City of Culture Trust and Chair of the WMCA Cultural Leadership Board

As the Chair of the WMCA Cultural Leadership Board I am proud that during an extremely difficult year, we have found strength in collaboration and been able to produce this comprehensive report. It will provide us with the evidence base to continue the work of the board, and I am optimistic that this new report can help make the case for positive new developments across the region.

This report gives us the clearest picture we have ever had on the cultural sector in the West Midlands. At the heart of this is the way we can improve access to culture to our residents and visitors alike. Coventry City of Culture Trust has already done a lot of work around cultural engagement, to better understand the gaps and inequalities in provision. It is good to see some of this learning incorporated into this report, and we will be using the data and findings to complement our work.

It is also great that the report highlights the tremendous social value that arts & culture can deliver. While it may be more difficult to measure, it makes a significant contribution to our communities & society and is a central aspect of our work in Coventry.

This research has for the first time analysed our existing cultural infrastructure at region, putting a spotlight on what already exists and providing clarity where there are gaps in provision. It is vital that we continue to expand opportunities around our cultural ecosystem and the infrastructure supporting it.

Peter Knott, Midlands Area Director for Arts Council England

This cultural mapping provides detailed insight into the region's cultural assets and explores opportunities for place-based work - including major events like Coventry City of Culture and Birmingham Commonwealth Games. This brings benefits to creative individuals, organisations and communities across the WMCA.

We want everyone to benefit from inspiring and entertaining art and culture - from visiting museums or enjoying a show with family and friends, to developing creative talents at home via a Zoom workshop. Investing in creativity can have a powerful effect on improving wellbeing, transforming the places where we work, live and study, developing communities and unlocking the economic potential for towns and cities throughout the country.

Erica Love, Director – Culture Central

These pieces of research give us a significant insight into the lived experiences of communities within the West Midlands. This data is an invaluable resource for anyone who is interested in the ways in which culture and creativity play a part of our regional identity. At Culture Central, we are excited about the potential that this research provides, and the opportunity that we have to put the insights from this data into practice, working as a collective to ensure that we can all create opportunities through culture for the places and people of the West Midlands.

Anita Bhalla OBE, Board Member and Creative Lead, Greater Birmingham and Solihull LEP

LEPs play a vital role in investing in people, places and businesses to drive forwards inclusive economic growth and increase quality of life. Greater Birmingham and Solihull Local Enterprise Partnership (GBSLEP) has committed more than £30m in culture over the last four years, recognising the crucial role this sector can play in transforming our places, improving the well-being of our people and broadening opportunity for our communities.

We have established 'Cultural Action Zones', which are making a difference to our local centres and speeding up covid recovery on our high streets. Our £3m investment into a new Creative Content Hub for Birmingham is bringing more television and high-end film production to the region. We have also been developing new support programmes, for creative freelancers, creative businesses, and piloting new flexi-apprenticeships so that microbusinesses can access apprentices for the first time. Our unique Triple Helix structure of bringing local government, businesses and educational organisations together enables us to make targeted investments in a sustainable way.

None of these investments would be possible without evidence to back them up, from research to grassroots relationships with our creative businesses and communities. The high-quality data that this research has unearthed will guide and underpin our current and future policymaking. It will also play a critical role in our ability to advocate for the cultural sector nationally. GBSLEP views the cultural sector as a catalyst for economic recovery that will enable the levelling up of people, places and businesses in the West Midlands.

Fiona Allan, Chair of the West Midlands Regional Board for Tourism, West Midlands Growth Company

The West Midlands is home to a hugely vibrant, varied and compelling cultural scene, which contributed significantly to the £13.1 billion that tourists spent in the region in 2019. Whether it's theatres or museums, music arenas or heritage attractions, the region's cultural venues and festivals are the lifeblood of our tourism offer. They anchor the West Midlands' sense of place and purpose. They inspire visitors to come and explore, then choose to return, time and again.

As we start to welcome back more people to safely enjoy the West Midlands' internationally renowned cultural brands, this region has a once-in-a-generation opportunity to bounce back and lead the UK's economic recovery and resurgence post-pandemic.

Major events such as Coventry UK City of Culture and the Birmingham 2022 Commonwealth Games, together with its Cultural Festival, can be a focal point for national celebration and international interest. They can provide a catalyst for increased awareness of the West Midlands' cultural tourism credentials.
Coordinated by the West Midlands Growth Company with regional and national partners, the Business and Tourism Programme will seek to maximise the benefits that the Commonwealth Games will bring. It will create a long-term legacy by boosting perceptions of Birmingham, the West Midlands and the UK as a world-class destination for tourism and culture.

As momentum and excitement builds ahead of a transformative 12 months in the arts spotlight, we support this analysis into the West Midlands' cultural sector, and encourage people to use these findings as we collaboratively shape our visitor offer.

Background

Arts & culture have a really important role in our society, both in terms of economic impact, as well as bringing together communities, delivering social value and supporting our health and wellbeing.

In 2020, regional partners to commissioned two pieces of research that would provide more information about the cultural sector within the WMCA area.

The West Midlands cultural sector research project was a partnership between:

- West Midlands Combined Authority (WMCA) & WMCA Cultural Leadership Board
- Birmingham 2022 Commonwealth Games
- Coventry City of Culture Trust
- Birmingham City Council
- Greater Birmingham & Solihull Local Enterprise Partnership
- West Midlands Growth Company
- Culture Central

The project received funding from Arts Council England and The Department for Digital, Culture, Media and Sport (DCMS).

The purpose was to undertake both quantitative and qualitative analysis of the cultural sector in the West Midlands to provide an evidence base for future development of the sector, as well as maximise opportunities around major events and other place-based approaches. The aim was to provide a pre-Covid baseline, although the reports will also touch on the impacts of the pandemic.

The geographical focus of the project was on the three WMCA Local Enterprise Partnership (LEP) areas; Greater Birmingham & Solihull LEP, Black Country Consortium and Coventry & Warwickshire LEP. The Local Authorities included are listed on page 11.

The project included two overlapping strands of work:

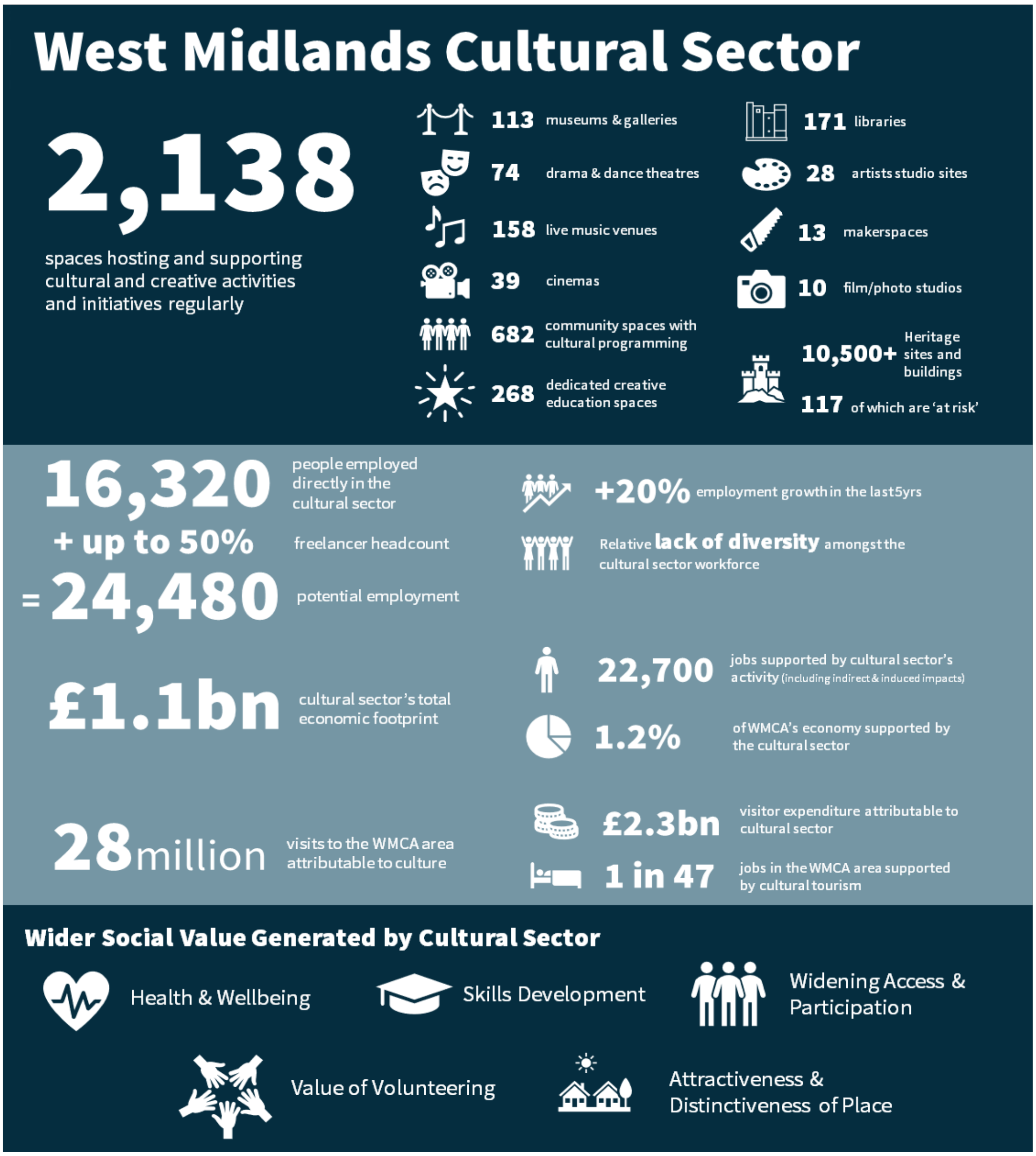
1. **The Audiences & Engagement Strand** which included mapping & analysis of available population data and cultural engagement data. The aim was to analyse how people are engaging with arts & culture in the region, as well as provide some suggestions on how we could better encourage and capture this going forward.

2. **The Infrastructure & Economic and Social Impact Strand** included analysis of cultural sector employment, FE/HE education data relating to arts subjects, the regional impact of cultural tourism, levels of public & private investment into culture, as further analysis of four cultural clusters (North Birmingham, Digbeth in Birmingham, Leamington Spa and Dudley). The report summarises these finding to provide a baseline for the economic value, together with a framework for social value. Another key output of this strand is a digital Cultural Infrastructure Map which is available for anyone to use on the WMCA website.

This report covers the Economic and Social Impact – and Cultural Infrastructure Strand

Executive Summary

i. The West Midlands Combined Authority (WMCA) co-commissioned Hatch, We Made That and Tom Fleming to undertake both a quantitative and qualitative analysis of the cultural sector in the WMCA area.[1] The analysis provides an evidence base for future development of the sector in the region, as well as helping to maximise opportunities around major events and other place-based approaches. This work has become even more important in light of COVID-19, with the cultural sector being one of the most impacted by the crisis as theatres, museums, concert halls and galleries have been forced to close their doors, community projects cancelled, and major cultural tourism attractions unable to welcome their visitors. Understanding the performance of the sector will be critical in developing appropriate initiatives to support the sector's recovery.



[1] Note that the study area is defined throughout as the three Local Enterprise Partnership (LEP) areas in the WMCA area: Black Country LEP, Coventry and Warwickshire LEP and Greater Birmingham and Solihull LEP areas.

Cultural Infrastructure Mapping

- Cultural infrastructure has been mapped across the three WMCA core LEP areas in order to support a shared understanding of the cultural assets across the region and to inform the development of strategies and proposals to support sustainable growth in the sector. All infrastructure has been mapped which are **physical spaces hosting and supporting creative activities and initiatives regularly or as their primary function**.
- The mapping exercise has identified **more than 2,000 spaces hosting and supporting cultural and creative activities** and initiatives regularly, spread across the 19 local authorities and 3 LEP areas. This includes:
  - 113 museums & galleries
  - 74 drama & dance theatres
  - 158 live music venues
  - 39 cinemas (including 10 independent cinemas)
  - 682 community spaces within cultural programming
  - 171 libraries and 268 dedicated creative education spaces
  - 28 artists studio sites, 13 makerspaces and 27 creative workspaces
  - 19 film/photo & 128 music studios for hire
  - Over 10,500 heritage sites and buildings, including 117 buildings at risk.
- Maps showing the cultural infrastructure spaces are shown in this report, and an interactive map is available to view on the WMCA website.

Cultural Sector Employment

- There are **16,320 people employed in the cultural sector** across the WMCA region. The sector accounts for approximately 0.9% of the total employment across the area, although supports a much wider number of jobs, as this underestimates the size of the freelancer economy (which is substantial in the sector) and wider spillover effects (see chapter 7). This includes a range of occupations (e.g. cultural organisations employ accountants and retail professionals as well as core cultural professionals).
- Estimates from elsewhere suggest that the cultural sector could have up to an **additional 50% headcount** once freelancers are included.
- The WMCA area has **one of the largest cultural sectors when compared to other combined authority areas** across the country, and the sector's employment share is roughly equal to that of the Liverpool City Region and West Yorkshire Combined Authority areas.
- A **large proportion** of the area's cultural employment is based in Birmingham, with other hotspots of activity in Stratford-on-Avon, Warwick, and Coventry.
- The cultural sector has been **rapidly growing** over the last five years (+20%) exceeding the national growth rate (+12%) and the wider economy growth rate for the WMCA area (+5%).

- **COVID-19 has had a significant impact** on the cultural sector, with around a third of employees currently taking up the Coronavirus Job Retention Scheme (CJRS) and the number of job postings down by 29% since 2019.
- The cultural sector workforce has a much **higher proportion of part-time workers** relative to other sectors of the economy (with noticeable exceptions in Stratford-on-Avon and Lichfield).
- There is a **relative lack of diversity** amongst the cultural sector workforce, with under-representation from ethnic minority groups and lower socio-economic backgrounds.

Further & Higher Education within the Cultural Sector

- There are around **5,500 students enrolled in cultural-related further education courses** in the WMCA area. Of these, there has been a high proportion of take-up from typically under-represented groups in the sector, with a high proportion of students from female and ethnic minority backgrounds.
- There is a **good provision of cultural-related further education courses** across the WMCA area, with concentrations around Coventry, Wolverhampton, Dudley, and Eastern Birmingham.
- Take-up of cultural-related A Levels is **below the national take-up level** by 20-30%. Coventry has one of the highest take-up levels of cultural subjects, but other areas lag behind.
- There are a range of higher education institutions providing cultural-related courses, with around **8,200 students enrolled** across the WMCA area. The most popular courses are design studies, drama, and music, with Birmingham City University being the largest provider of higher education cultural-related courses.
- The popularity of cultural-related courses in the West Midlands has remained relatively consistent over the last decade, but there has been a **drop in accepted applications** to West Midlands universities of 20% since 2016 (pre COVID-19 pandemic). There has been varied performance across different cultural courses, with take-up of music, dance, imaginative writing, and drama courses growing strongly, but declining applications for crafts, fine art and combinations with creative arts and design courses.

Public & Private Sector Investment to the Cultural Sector

- There is a **wide range** of public and private sector investment into the cultural sector in the WMCA area.
- The WMCA area has received **£388m** of funding from the National Lottery Heritage Fund between 1994 and 2020, with the majority of projects being 'built environment' or 'community, cultures and memories, or intangible heritage' projects. National Lottery Project Grants have invested a combined **£17.1m** in the WMCA area since 2018/19.
- The Arts Council National Portfolio programme provides funding to organisations which demonstrate a commitment to artistic excellence and ambition. The WMCA

area has received **£291m** in investment over the 2015-18 and 2018-22 funding cycles, with theatre and dance organisations the largest recipients of funding.

- The DCMS Cultural Recovery Fund (administered by Arts Council England, National Lottery Heritage Fund, Historic England and BFI) was launched to protect the UK's culture and heritage sectors. Cultural organisations in the WMCA area, received over **£62.1m** worth of capital and grant funding and an additional **£23.4m** of repayable finance. In total, the area received **8%** of the national funding pot. The per capita investment for the WMCA area was **£20.39**, slightly higher than the national average of **£18.84**.
- Local authorities across the WMCA area play an important role in investing in cultural facilities. At least **£82.4m** was invested by local authorities in archives, museums, arts, and libraries in 2018-19.
- Local Enterprise Partnership (LEP) Funding has also been a key source of funding for the WMCA area which is part of 3 LEP areas. LEP funding has been particularly instrumental to enabling cultural infrastructure and regeneration projects.
- Cultural organisations often operate using a mixed funding model, using both public and private funding sources. With public sector funding holding a large opportunity cost, the role of private sector investment in culture is increasingly important. Arts and cultural organisations in the West Midlands received **£36m**, of which 51% came from Trusts and Foundations, 26% from individual giving and 23% from businesses.

Cultural Tourism Data & Economic Contribution

- Cultural tourism is an important economic driver within the WMCA area, bringing both domestic and international tourists into the area. The diverse offer of the area alongside the events and festivals hosted in the area, attracts people into the region.
- Cultural was the primary purpose of visit for **over one in five visitors** to the WMCA area (21%), with visitors coming for other reasons also undertaking cultural activities when they visit.
- We estimate that around **28 million visits** to the WMCA area in 2019 were attributable to culture. Based on average spend by each visitor, it implies that a total of **£2.3 billion of visitor expenditure** is attributable to cultural tourism in the region.
- Based on this analysis, it implies that cultural tourism generates in the order of **40,000 jobs** and **£1.8 billion in GVA**, which is roughly equivalent to **1 in 47 jobs** and **£1 in every £55 of GVA** in the WMCA area.

Economic Contribution of the Cultural Sector

- **Direct economic contribution**: the WMCA cultural sector plays an important role in supporting the area's economy. the cultural sector directly employed a total of **16,320 jobs,** or 12,800 FTEs in the WMCA area before the pandemic. Published data tells us that the sector made a **total direct contribution to GVA of approximately £560 million**, equivalent to **£1 in every £172 of GVA** in the WMCA area.
- **Indirect multiplier effects**: the cultural sector has a significant wider effect on the economy through supply chain purchasing. Hatch's calculations using a regional input-output model shows that the cultural sector supports roughly **6,500 FTE**

jobs and **£335 million in GVA** in other sectors in the WMCA area through supply chain effects

- **Induced multiplier effects**: as workers employed directly and those within the supply chain spend their wages and salaries, this supports further economic multipliers known as induced effects. Through our analysis, the cultural sector supports a further **3,450 jobs** and **£215 million in GVA** in the WMCA area through these induced effects.
- **Total economic contribution**: bringing together all of these impacts, we conclude that the total core economic footprint of the cultural sector in the WMCA area is equivalent to **22,700 jobs** and **£1.1 billion in GVA** (or roughly 1.2% of the WMCA economy).
- For comparison, the sector has a **larger multiplier effect** in the area than that of the **retail, legal and accounting, and real estate sectors**. The sector's total economic footprint is roughly similar in scale to direct employment in the low carbon and environmental technologies sector.

Social Value of the Cultural Sector

- The cultural sector generates a number of important benefits for society, which go **well beyond the economic benefits** generated by the sector. There is a significant and growing body of evidence on these benefits, some of which uses quantitative/monetary measures. However, applying this evidence at an aggregate level of a region cannot be done in a robust manner.
- To assess the social value generated by the sector, we have developed a framework to capture the different mechanisms through which the cultural sector generates social value. The five key areas assessed are: **health & wellbeing, skills development, widening access & participation, volunteering, and enhancing the attractiveness and distinctiveness of place**. The report uncovers a range of case study examples on how these benefits are being generated in the WMCA area.
- Better capturing the social value generated by the cultural sector, and understanding what people and places value will be important in helping to articulate its value to society, beyond its pure economic contribution.

Recommendations

ii. This report provides a detailed evidence base on the cultural sector in the West Midlands Combined Authority area. It covers a wide-ranging, pre-pandemic baseline on cultural sector infrastructure and assets, employment, economic and social value, visitor economy spillovers, and skills.

iii. Going forward, there are opportunities to fill gaps in the evidence by:

- Better capturing the role of **freelancers and micro-enterprises** in the sector.
- More systematically capturing the value of **cultural tourism** via regular surveys
- Assessing the role and value of **individual institutions** in the region, potentially via commissioning a regular survey of cultural institutions in the area (as is done in Greater Manchester, for example) to capture key information on their operations, economic impact, social value and future issues/support needs.
- In due course, assessing separately the impacts of **Covid and Brexit** on the sector.

- Investigating **diversity** in the sector in more detail.
- Commissioning research on the role of cultural infrastructure in **shaping, animating and rejuvenating places, structures and streetscapes**
- Exploring the **intersection between technology software, infrastructure and hardware** (such as websites, location-based apps, wi-fi hot-spots, kiosks and beacons)
- Using the Cultural Infrastructure Map produced here as a 'live' resource which is updated and improved regularly.

iv. The evidence base should be a helpful resource to inform strategy development for the sector, as well as bids into place-based funds from Central Government. Whilst it is not the remit of this evidence base report to provide strategic recommendations per se, from our analysis and consultations in the region, we are able to offer some reflections:

1) A core goal should be to aim for a **genuinely inclusive and diverse cultural sector**. New infrastructure and programmes must be designed to open-up access, provide talent pathways, and invigorate a sector which does not reflect the diverse talent base of the region. This requires both a neighbourhood-based approach and a regional approach which better connects assets and seeks to enable creative talent to access professional opportunities.

2) Given the challenging environment for **high streets and town centres**, these can be the platforms for a next generation of culture-led development. This will need to go beyond meanwhile solutions and be part of a step-by-step approach to consider town centres as offering a fabric of cultural opportunity, linking different parts of the value chain and energising spaces across a range of art forms and activities.

3) There is an opportunity to look at further **exchange of ideas and coordinated programme activities between different parts of the region** – drawing inspiration from the London Boroughs of Culture model. This could include twinning activities between different neighbourhoods, cultural mobility and exchange activities such as residencies, and network-based activities which seek to build a regional identity and voice for the sector.

4) There is an opportunity to **align cultural development, public realm and transport infrastructure activities** – for example, the extension of the West Midlands metro and HS2 give impetus for new cultural infrastructure, public art, social infrastructure (festivals, events, training etc.) proximate to transport nodes. This is also a way of designing-out the disconnect between different neighbourhoods.

5) There are **threats to cultural education** in England emerging from national policy on university funding and the measurement of the "value" of particular courses in the arts and humanities. Given the strong base of provision in the WMCA, it will be important that partners ensure that the value of this provision, and the role it has in supporting the vibrancy of the cultural sector, is fully understood in Government.

6) Our analysis of clusters within the region suggests there is a **narrative gap** that could be filled. For example, Dudley can be a pioneer for creative production in an industrial and geological heritage landscape. Leamington can push harder as a centre for the creative freelancer - a hub which connects with the rural parts of the

county and a feeder to the larger clusters in Birmingham and nationally. North Birmingham as the place for genuinely diverse, equitable and ground-breaking sector development to become a national and regional hub for diverse creative and cultural practice. These narratives and identities could be developed further to encourage place branding and inward investment.

7) There is a very significant **post-Brexit threat** which is currently under the cover of Covid. When the economy opens up further, the region will need to move fast to connect with partners and markets in the EU - to arrest any more divergence and to recover as much lost soft power as possible.

8) The future development of the cultural sector should be underpinned by **inclusive growth**, environmental responsibility and linking culture to the UN Sustainable Development Goals. The sector is integral to social wellbeing and inclusion, which are critical underpinnings for any kind of 'good growth'.

9) **Healing and recovery** will be vital for the next few years - and the cultural sector can play a starring role if it is resourced to do so. **Cultural prescribing**, a ramp-up in cultural participation, and culture as a key part of place-making will generate multiple benefits across different policy agendas.

Introduction

1. Introduction

1.1 The West Midlands Combined Authority (WMCA), together with the research partners commissioned Hatch, We Made That and Tom Fleming to undertake both a quantitative and qualitative analysis of the cultural sector in the West Midlands. The analysis provides an evidence base for future development of the sector in the region, as well as helping to maximise opportunities around major events and other place-based approaches. The work forms a key evidence document to inform the Cultural Leadership Board's (CLB) ambitions for the WMCA.

1.2 This work has become even more important in light of COVID-19, with the cultural sector being one of the most impacted by the crisis as theatres, museums, concert halls and galleries have been forced to close their doors, community projects cancelled, and major cultural tourism attractions unable to welcome their visitors. Understanding the performance of the sector will be critical in developing appropriate initiatives to support the sector's recovery.

1.3 This research has the following key outputs:

- Mapping of cultural sector infrastructure and assets
- Analysis of cultural sector employment in the West Midlands
- Analysis of FE/HE education data relating to cultural sector
- An analysis of public & private sector investment into the cultural sector
- Analysis of cultural tourism visitor data
- Estimates on the economic impact of the cultural sector and related social value

1.4 This research forms one part of a two-stage commission which includes:

1) **Audience Strand** – providing an analysis of West Midlands audience data, understanding audience and cultural participation, and developing an audience strategy for existing, returning and new audiences.

2) **Cultural infrastructure, economic impact, visitor data, employment, skills and social value strand** – this piece of research.

1.5 Much of this research has been prepared at a time of great economic uncertainty as a result of the COVID-19 crisis. This is an ever-evolving situation, with the economic future dependent on how easily the virus can be contained. As a result, caution should be taken over the data presented in this report. Where possible, the latest data has been used to show the impact of COVID-19, however the majority of the data shows activity pre-pandemic, as more recent data has not yet been published.

Study Methodology

Sector Definition

1.6 The cultural sector across the WMCA area encompasses a hugely diverse array of activities, including visual and performing arts, museums, festivals, music and cultural attractions and a rich heritage (including archaeological sites, castles, churches, stately homes and country houses).

1.7 Capturing all of this activity through statistical definitions is challenging, as there is currently no internationally agreed definition. DCMS has developed a definition which best captures the breadth of activity within the sector, reflecting the availability of data on the standard industrial classifications (SIC). This definition is shown in the adjacent table, reflecting the sub-sectors which make up the wider culture sector. The SIC codes used are presented in Appendix A.

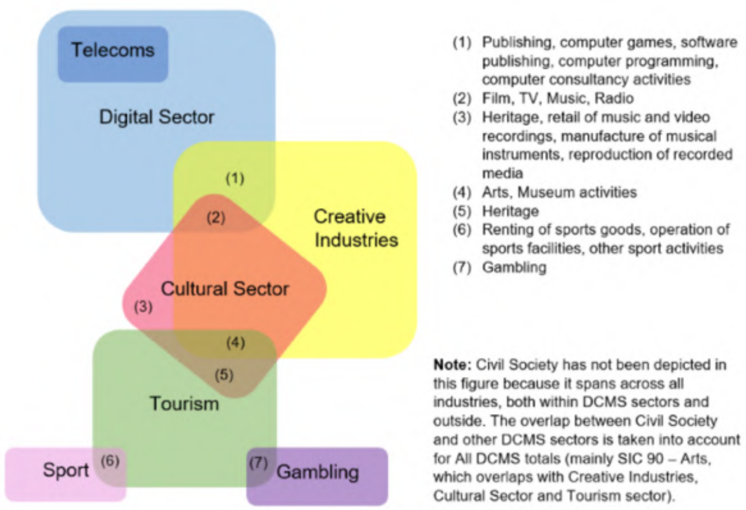
Table 1.1 DCMS Cultural Sector Definition
Arts (Performing Arts, Artistic Creation)
Film, TV and Music
Radio
Photography
Crafts
Museums and Galleries
Library and Archives
Cultural Education
Heritage

Source: DCMS Economic Estimates, 2017

1.8 For the purposes of this project, we have excluded film, TV and music from the analysis where possible, to highlight activity taking place in the cultural sector outside of this sub-sector.

1.9 In reality, the cultural sector has significant overlap with other sectors of the economy as demonstrated below, with the cultural sector overlapping with the digital, creative industries and tourism sectors based on its definition.

Figure 1.1 Crossover between culture and other sectors (by statistical definition)

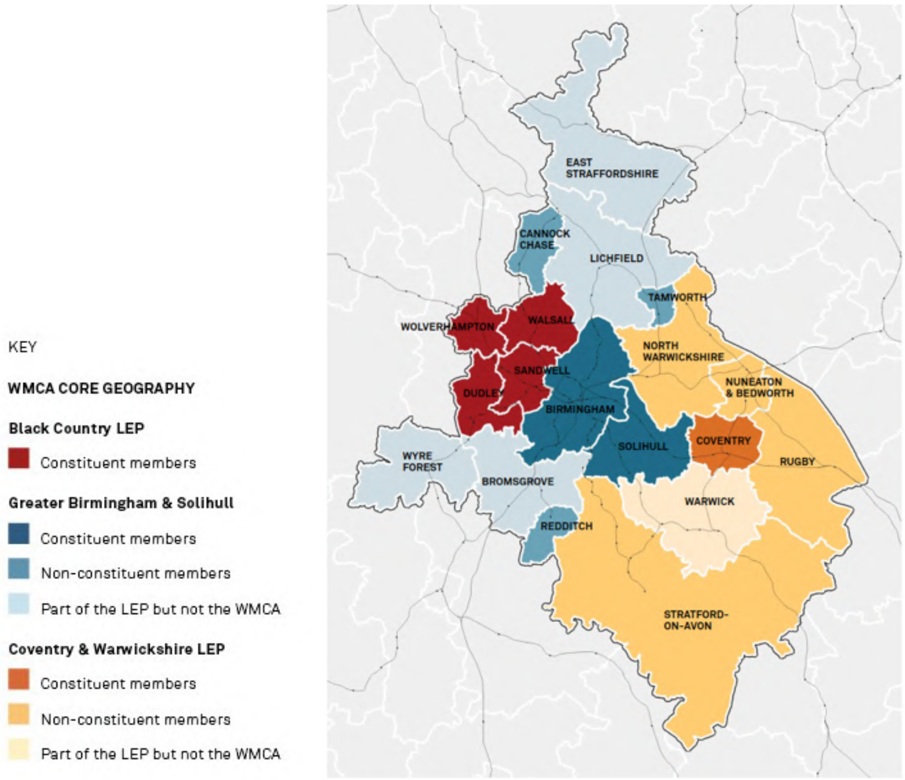


Source: DCMS Sector Economic Estimates Methodology

Study Geography

1.10 The purpose of this report is to provide information and analysis on creative businesses across the three WMCA core LEP areas, namely Greater Birmingham & Solihull LEP, Black Country LEP and Coventry & Warwickshire LEP. The map below shows these three LEPs and their constituent local authorities.

Figure 1.2 Map of the Study Geography



Source: We Made That

1.11 It should be noted that the WMCA area is not the same as the West Midlands region. In a small number of instances, where data is only available at the West Midlands region level, we have used this as the best fit, and this has been made clear alongside the relevant data source.

Study Approach

Table 1.2 Study Approach

Cultural Sector Infrastructure (Section 2)	• Identifies and develops a methodology for mapping cultural infrastructure and assets within the WMCA area. • Highlights the results from the mapping exercise that has been undertaken.
Cultural Sector Employment (Section 3)	• A review of cultural sector employment across the West Midlands, including statistics relating to the diversity of the cultural workforce and leadership including full-time vs part-time employment, informal (casual) employment, and the diversity of the workforce.

Further & Higher Education within the Cultural Sector (Section 4)	• A review of the current supply of cultural skills across the West Midlands, including the number of enrolments onto cultural courses at both the further and higher education institutions.
Public & Private Sector Investment to the Cultural Sector (Section 5)	• An overview of public and private sector investment into the cultural sector to identify key sources of investment into the cultural sector.
Cultural Tourism Data & Impact (Section 6)	• Identifies pre-COVID cultural tourism visitor data, including number of visits, motivations and visitor spend. • Calculates the economic impact of cultural tourism on the WMCA area.
Economic Impact of the Cultural Sector (Section 7)	• Estimates on the economic impact of the cultural sector, including its wider spillover benefits.
Social Value of the Cultural Sector (Section 8)	• Provides a framework and approach to identifying the social value generated by the cultural sector alongside a series of case studies demonstrating the impact of the sector on communities in the WMCA area.

Cultural Infrastructure Mapping

2. Cultural Infrastructure Mapping

2.1 We Made That, Hatch and Tom Fleming Creative Consultancy have been commissioned to research and deliver data outputs that will make up the region's first Cultural Infrastructure Map. This document sets out the methodology and approach used to collect the data as well as key findings from the mapping exercise. The definition of 'cultural infrastructure' as well as the classification framework to be used have been developed with the idea that the map could be scaled over time, so that additional layers, data and information could be added to it in the future.

A cultural infrastructure map for the WMCA region

2.2 The brief states that the digital cultural sector infrastructure map for the three WMCA core LEP areas, should be primarily used to develop a shared understanding of the cultural assets across the region and to inform the development of strategies and proposals to support sustainable growth in the sector.

2.3 This cultural mapping exercise forms part of a wider project seeking to provide quantitative and qualitative analysis of the culture sector in the West Midlands, to provide an evidence base for future development of the sector in the region, as well as maximise opportunities around major events and place-based approach. The cultural sector, as part of the region's wider industries, is a key component of the Local Industrial Strategy and the Creative Industries Sector Plan.

Defining Cultural Infrastructure

2.4 Culture is what underscores the identity of a place and strengthens local identities and the collective identity of a place bringing together people from various backgrounds. It is supported by physical infrastructure, namely 'cultural infrastructures', which is discussed and defined in different terms by different stakeholders.

2.5 In its Cultural Infrastructure Plan (2020), the Mayor of London defines cultural infrastructures as the buildings, structures and places where culture is consumed (experienced, participated in, showcased, exhibited or sold) or produced (places of creative production, where creative work is made, usually by artists, performers, makers, manufacturers or digital processes).

Working definition
For the purpose of this commission, and with the intention of building a solid initial database and mapping of the cultural infrastructures across the region, 'cultural infrastructure' is to be understood as the physical spaces hosting and supporting creative activities and initiatives regularly or as their primary function.

The spaces mapped are expected to be 'open' in a sense that each member of the community can access them to produce or consume culture or creative activities.

Classification Framework

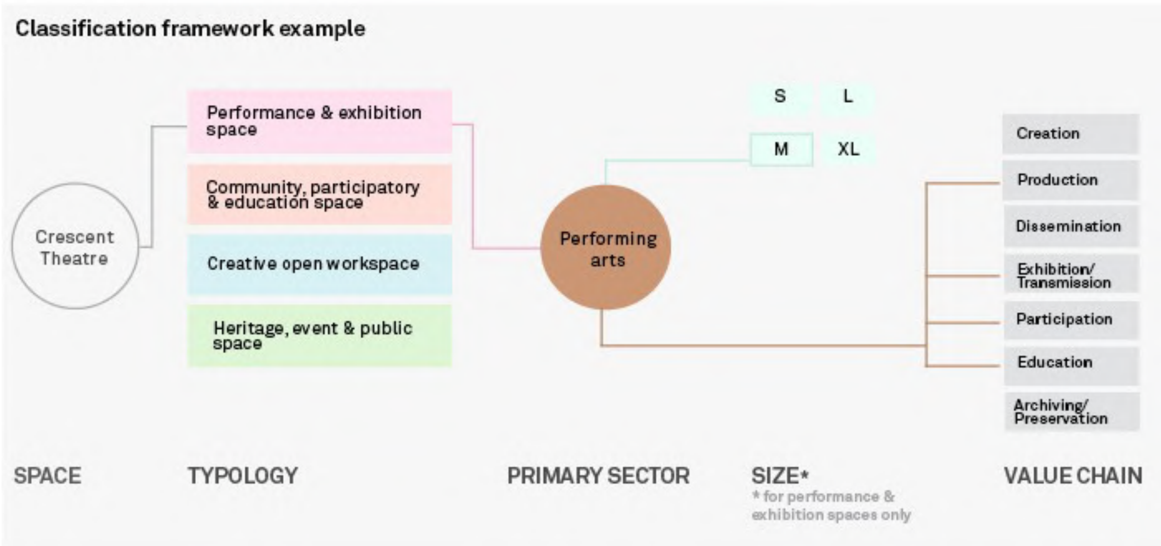
2.6 The rationale for this classification framework is twofold: first, to produce a robust and replicable framework which can evolve and be built upon in the future; and second, to highlight the spatial, sectoral and relational dimensions of cultural infrastructures in the WMCA region.

2.7 The value of this framework is that it provides a comprehensive means of covering formal and more informal forms of cultural infrastructure. This aim can be achieved through clearly articulating the range of typology in the WMCA region and their associated sub-typology.

2.8 In addition, the spatial features of this classification framework are complemented by the addition of a 'primary sector category', which identify the main creative sector each space is part of or supporting, and of a 'value chain' role which shows the diverse ways in which these spaces can be utilised. These additional categories, looking beyond the physical space, means distinguishing between the mapping of fixed, defined cultural spaces, the primer creative sector concerned and the charting of fluid, dynamic cultural processes and roles across these spaces.

2.9 Finally, capacity (seated or standing) of all performance spaces have been recorded to allow for an understanding of scale.

Figure 2.1 Classification Framework Example



Source: We Made That

Cultural Infrastructure Typologies

2.10 The table below presents the main typology and sub-typology comprising the classification framework. While some spaces may be more commonly known (such as performance and exhibition space), the framework also accommodates the sometimes-less visible spaces (e.g. community-focused spaces or rehearsal studios).

Figure 2.2 Cultural Infrastructure Typologies Table

Core typology	Sub-typology
Performance & exhibition space	Drama & dance theatre
	Concert hall
	Live music venue
	Large entertainment venue
	Multi-purpose & arts centre
	Museum & gallery
	Cinema
Community, participatory & education space	Community-focused space
	Creative-led hub
	Creative education space
	Library & archive
Creative open workspace	Artists studio
	Makerspace
	Workspace with creative facilities
	Creative IACs (Incubators, Accelerators, Co-working spaces)
	Specialist production & rehearsal facility
Heritage, environment and outdoor spaces	Heritage & environmental attraction
	Listed building
	Heritage at risk
	Scheduled monument
	Outdoor event space

Source: We Made That

- **Performance & exhibition space:** Performance and exhibition spaces provide cultural infrastructure for audiences and enable spectatorship. These spaces tend to have a cultural mandate (though that may not necessarily be their primary rationale) and are usually equipped with purpose-built facilities or equipment in order to facilitate cultural activities and events.
- **Community, participatory & education space:** This typology focuses on spaces where cultural and creative activities are facilitated or accessed in a participatory or communal manner. They constitute the infrastructure that underpins both the self-directed and interactive participation of individuals or groups in culture or creative practice and the education and development across the range of creative disciplines (e.g. art. drama, music and film). These spaces may or may not be publicly owned.
- **Creative open workspace:** This typology focuses on managed workspaces which are either explicitly targeted to artists or creative tenants, or which provide facilities for creative creation or production. Workspaces must be operated by a provider of some form in order to be included on the map; workspaces which are tenanted directly from a landlord by a single creative organisation, for example, would not be included in this typology.
- **Heritage, environment and outdoor space:** The location of 'heritage, environment and outdoor spaces' spans: regular festival spaces, open public

spaces regularly used for cultural events, as well as tangible environmental and heritage assets. The key attribute of these spaces is that they provide opportunities for community members to experience cultural assets and activities outside traditional cultural venues.

Incorporating Sector Information

2.11 It is recognised that a single space or building can have multiple functions or be targeted to a specific sector, and that any mapping or classification exercise will overlook some of the activity and value that these spaces provide and support.

2.12 In addition to recording core and sub-typologies, a 'primary sector' will be attributed to each of the space. This will allow for the spaces to be understood through the lens of their primary sector of activity. The adjoining table presents the sector categories to be used in the mapping.

As one example, a craft school would be primarily classified as 'Creative education space' (=typology), and secondarily as 'Crafts' (=creative/cultural sector).

2.13 In the future, individual businesses and organisations might be added to the map, and these additional data could build upon this sector categorisation.

Figure 2.3 Cultural and Creative Sector Table

Cultural & creative sector definitions (DCMS)	Sector categories to be used	Note
Cultural sector		
Arts		Captured within creative sector definition
Film, TV and Music	X	
Radio	X	
Photography	X	
Crafts	X	
Cultural education	X	
Museum and gallery	X	
Library and archives	X	
Heritage	X	
Creative sector		
Advertising and marketing	X	
Architecture	X	
Crafts		Captured within cultural sector definition
Design: product, graphic, fashion	X	
Film, TV, video, radio, photography		Captured within cultural sector definition
IT, software and computer services	X	
Publishing	X	
Museums, galleries, libraries		Captured within cultural sector definition
Performing arts	X	
Visual Arts	X	

Source: We Made That

Incorporating Value Chain Roles

2.14 It is also recognised that a space can also be involved and have a role in the different stages of the cultural supply and value chain, and that how cultural production and activities take place goes beyond a simple grouping of sector or typology.

2.15 In order to capture some of these elements and allow for each space to be understood beyond their spatial form, the value chain role(s) of each space will be recorded.

2.16 Based on the UNESCO Culture Cycle Framework and the DCMS Evidence Toolkit (2014), seven key value chain roles have been identified. These should be understood as working in a cyclical way rather than a liner way to reinforce the idea that the relationships can be complex and occur more as a network.

- **Creation:** the originating and authoring of ideas and content (e.g. sculptors, writers, design companies) and the making of one-off production (e.g. crafts, fine arts). An **artist studio space** would be designated against this category
- **Production:** the reproducible cultural forms (e.g. TV-programmes), as well as the specialist tools, infrastructure and processes used in their realisation (e.g. the production of musical instruments, the printing of newspapers). A **print workshop** or a **theatre producing shows** would be designated against this category
- **Dissemination**: the bringing of generally mass-produced cultural products to consumers and exhibitors (e.g. the wholesale, retail and rental of recorded music and computer games, film distribution). With digital distribution, some goods and services go directly from the creator to the consumer. A **cinema** would be designated against this category
- **Exhibition/Transmission:** refers to the place of consumption and to the provision of cultural experiences to audiences. A **heritage site** or a **performance space** would be designated against this category
- **Participation:** the activities of audiences and participants in consuming cultural products and taking part in activities and experiences. A space offering painting, dance **classes or participatory digital experiences** would be designated against this category
- **Education:** the activities and initiatives covering lifelong learning and applies to a range of settings. These include learning an artform, learning through an artform and creative learning. A museum offering educative **workshops or learning opportunities** would be designated against this category
- **Archiving/preservation:** The activities and initiatives which seek to maintain both tangible and intangible heritage from the past for the benefit of the present and future generations. A **library** or a monument would be designated against this category.

2.17 Because our classification is of infrastructures – rather than of activities or organisations (although they may overlap) – some would inevitably be used for more than one value chain role. A theatre, for example, may be involved in creation, production, exhibition/transmission, and education. It is therefore suggested to not incorporate value chain roles into the classification as such. Rather, each role will have TRUE/FALSE attribute applied to each typology.

2.18 This will help in analysing the role and contribution of the mapped infrastructures in the cultural value chain.

Adding Scale/Capacity Information

2.19 In addition to the above categories, information on capacity (standing or seating) have been added to some of the performance and exhibition spaces, to get a sense of the varied portfolio of spaces present in the WMCA region and their scale.

2.20 It is important to note that while this information gives an indication on capacity, the analysis and information does not allow to drill down into the conditions or utilisation of these facilities. It is also important to recognise that many cultural facilities will have secondary and ancillary space (e.g. small exhibition space, office, storage etc.) associated with their main venue. These have not been recorded as part of this exercise.

2.21 The table below presents the categories that have been used to classify the typologies based on their capacity. The capacity range (S, M, L, XL) have been developed based on the Theatre Trust, Music Venue Trust guidances and the Independent Cinema Office.

Figure 2.4 Scale & Capacity Table

Performance & exhibition space	Drama & dance theatre	Concert hall	Live music venue	Large entertainment venue	Cinema
S	150 seats or less	300 seats or less	200pp standing or less		1-3 screens
M	150 to 400 seats	300 to 1,000 seats	200 to 1,000 pp standing	500 to 1,000 pp standing	4-10 screens
L	400 to 1,000 seats	1,000 to 2,000 seats	1,000 to 5,000 pp standing	1,000 to 5,000 pp standing	11-15 screens
XL	1,000 + seats	2,000 + seats	5,000 + pp standing	5,000 + pp standing	16-30 screens

Source: We Made That

Mapping Process

Data collection and compilation

Data sources

2.22 Identification of cultural venues and infrastructure, data sourcing and assessment have been guided by the framework presented in the previous pages.

2.23 To establish a database of the cultural infrastructures in the WMCA region, the team has liaised with key stakeholders (local authorities/LEP representatives, sector representatives and agencies) to collect existing information and quantitative data. The team have also reviewed a range of online resources, including:

- Local authorities' websites and databases listing facilities, cultural and community spaces and activities;
- Tourism websites (e.g. VisitBirmingham, VisitWorcestershire, BlackCountry Geopark);
- Existing local maps and resources (e.g. Staffordshire arts, Bromsgrove arts alive, Coventry Cultural assets mapping);
- Sector-specific venue finder (e.g. Coworker, venuescanner);
- Phone books and other web-based directories, art and cultural related.

Compilation of data

2.24 All cultural venues and infrastructure identified for this project were checked and validated by the team as well as standardised into a similar format. Venues that are located outside of the three LEP areas have been filtered out, non-cultural venues removed, and other venues which belong to any of our designed typologies added to the database. The consolidated database was transferred to GIS, and each entry linked to a geocode to prepare for map creation.

2.25 To create a single map from sources that were different in format and which presented different attributes for each single entry, the team has constructed a single database that generates the visual information for the maps, and also contains additional information that could be visualised according to the needs of the West Midlands Combined Authority and wider users. The final database allows access to data about each single element. It is organised in order for the user to navigate and filter the various attributes (typology, local authority, sector, size etc.)

Figure 2.5 Database Structure

Unique ID	X	Y	Space name	Organisation name	Adress	Postcode	Local authority	Typology	Sub-Typology	Primary sector	Value chain							Size/capacity	
											Creation	Production	Dissemination	Exhibition/ Transmission	Participation	Archiving/ preservation	Education	Size	Capacity
1045	-	-	Crescent theatre	Crescent theatre	20 Sheepcote Street	B16 8AE	Birmingham	Performance & exhibition space	Drama and dance theatre	Performing Arts		X		X	X			M	Main house: 340 (seated) Ron Barber: 120 (seated) Bar: 70 (seated) Roma's Room: 20 (seated)
1045	-	-	Crescent theatre	Crescent theatre	20 Sheepcote Street	B16 8AE	Birmingham	Creative open workspaces	Specialist production & rehearsal facilities	Performing Arts		X						-	
1046	-	-	The Sunflower Lounge	The Sunflower Lounge	76 Smallbrook Queensway	B5 4EG	Birmingham	Performance & exhibition space	Live music venue	Music			X	X	X			S	150 (standing)
1047	-	-	Steamhouse	Birmingham City University& Eastside Project	108 Digbeth	B5 6DT	Birmingham	Creative open workspaces	Creative IAC space	Design	X	X			X			-	
1048	-	-	Centrala	Birmingham Open Media	Unit 4 158 Fazeley Street	B5 5RT	Birmingham	Community, participatory & education	Creative-led hubs	Visual Arts	X	X		X	X		X	-	

Source: We Made That

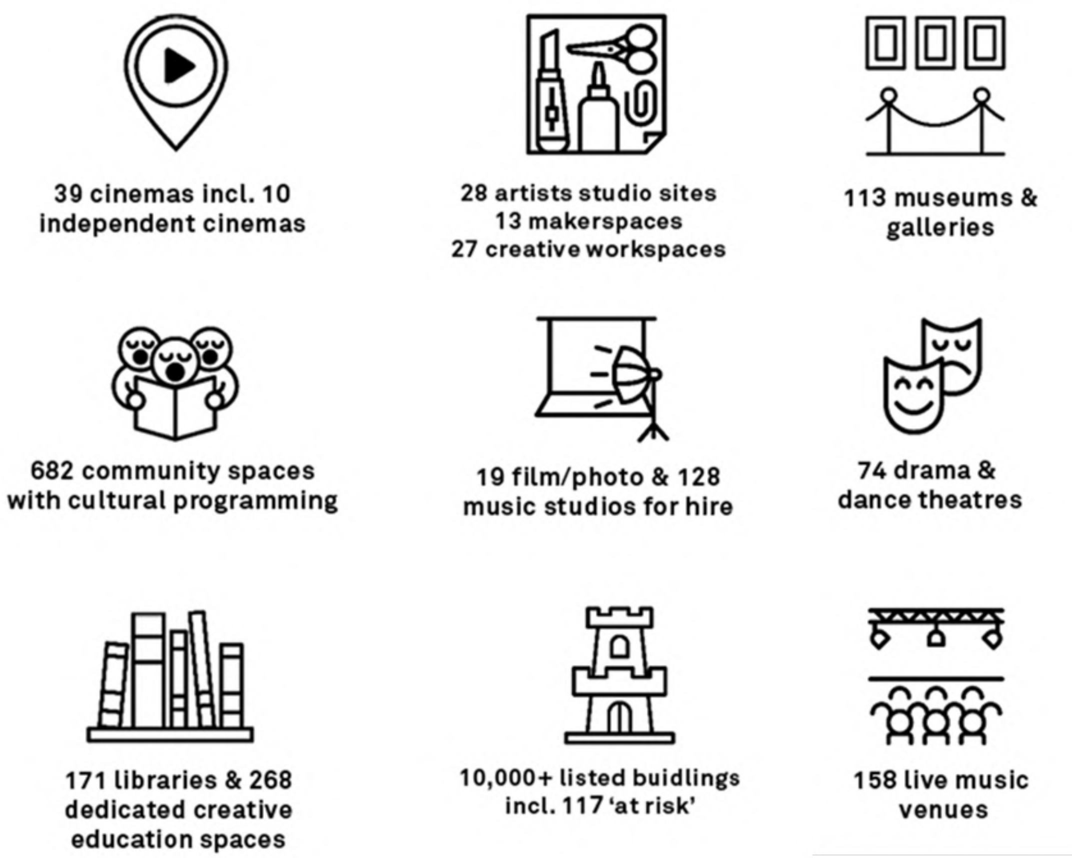
Cultural Infrastructure Mapping Overview

2.26 Cultural infrastructures bring a huge amount of value to the region and it is important to recognise the role that these facilities play in place-making, retaining and attracting creative and cultural professionals to the region, providing economic opportunities as well opportunities for socialisation and health and wellbeing.

2.27 The mapping exercise has identified more than **2,138 spaces** hosting and supporting cultural and creative activities and initiatives regularly, spread across the 19 local authorities and 3 LEP areas.

2.28 The mapping has also uncovered the presence of more than **10,579 heritage sites and buildings**, including 287 scheduled monuments, 25 heritage parks or gardens, and 117 listed buildings at risk.

Figure 2.6 Summary of Cultural Infrastructures in the 3 LEP Areas



Source: We Made That

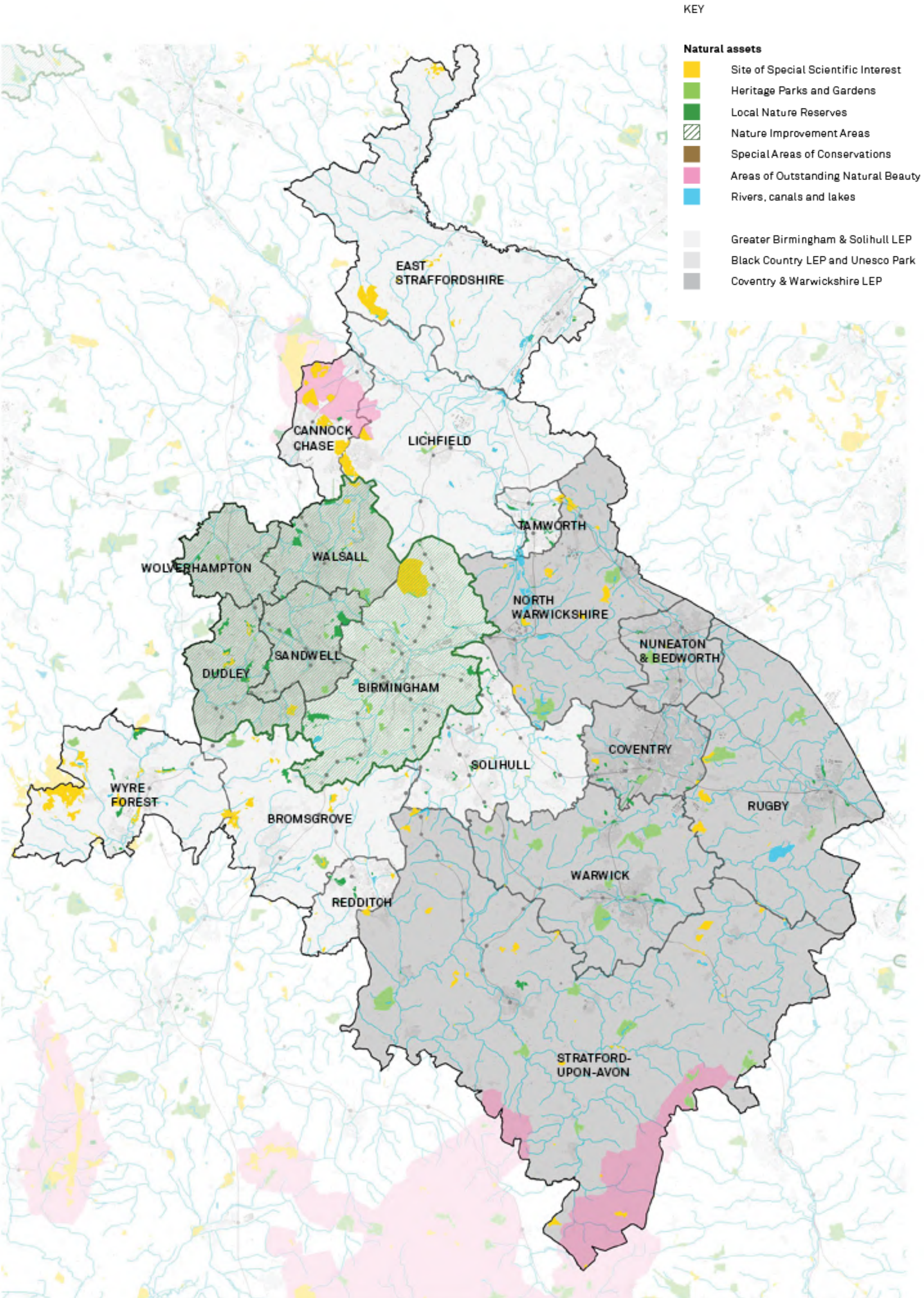
Geographies & Natural Assets

2.29 Natural assets and cultural assets are different but interrelated types of feature with value. In this way, it is important to consider natural and natural heritage assets when considering cultural infrastructure.

2.30 The West Midlands has a rich and varied natural environment as well as important habitats or biodiversity protected through legal site designations.

2.31 The West Midlands plateau, a watershed between two of the largest river systems in the UK, is also one of the most geologically diverse regions in the world. Previously an area of dense woodland, its matrix of valleys stretches from the Black Country, the crucible of the industrial revolution, to Birmingham, once the city of a thousand trades and now one of the most rapidly developing business hubs in Europe, from Medieval Coventry to the Saxon town of Tamworth. Last year, the Black Country has been awarded UNESCO global geopark status, recognising it as an area of outstanding geological heritage with more than 40 designated geosites.

Figure 2.7 Geographies & Natural Assets



Source: We Made That

Cultural Infrastructure – All

2.32 More than **2,138 spaces** were identified as part of the mapping exercise. The spaces are scattered across the whole region, and each type of cultural infrastructure exhibits distinct spatial clustering.

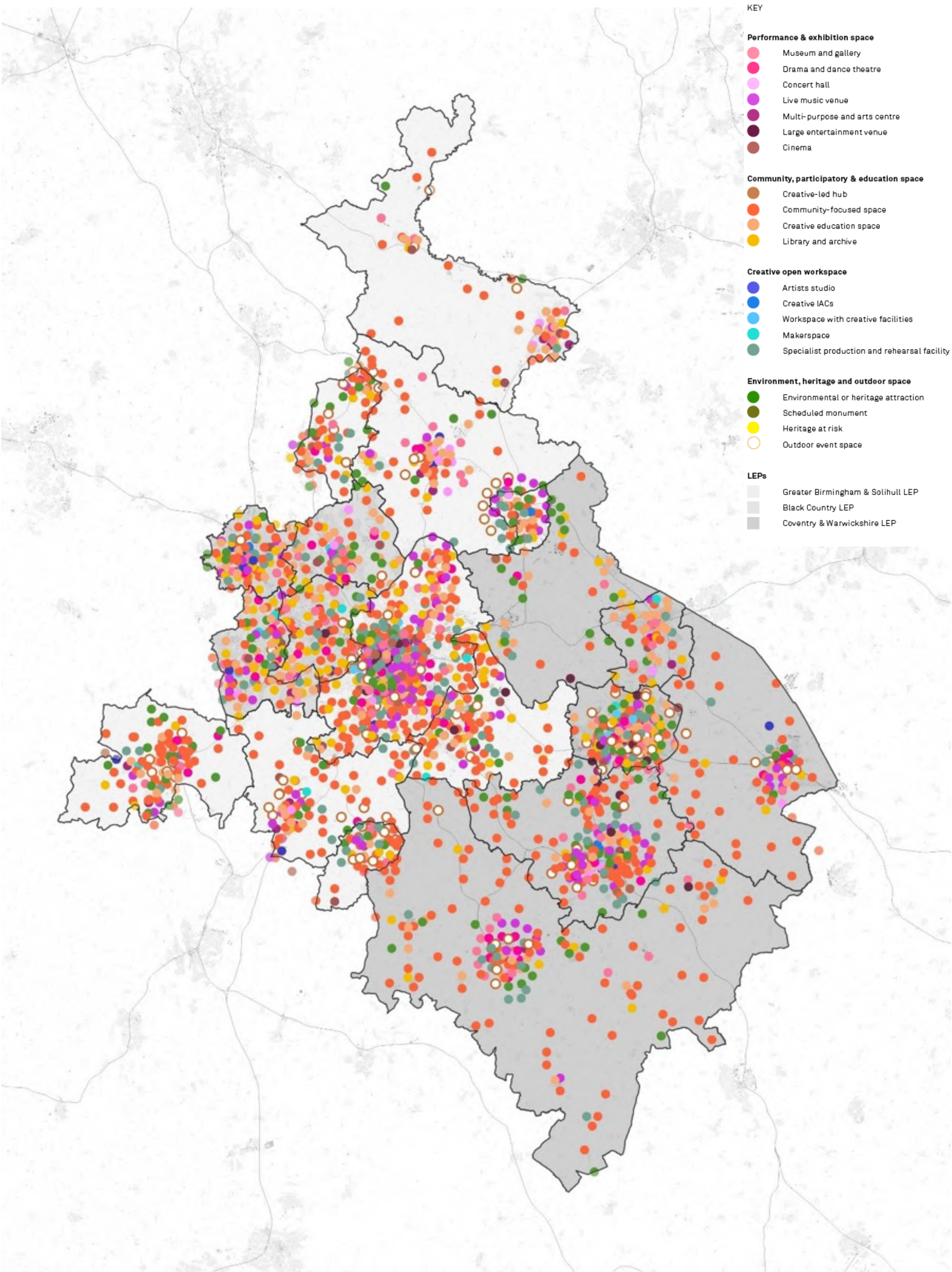
2.33 Overall, **53.4%** of the spaces identified in this mapping are classified as **community, participatory, and education spaces.** This category includes community-focused spaces that host culture including, for example, many village halls and community centres, creative education spaces such as dance and music schools, libraries, and creative-led hubs.

2.34 **21.5%** comprises of **performance and exhibitions spaces** - live music venues, museums and galleries, theatres, cinemas, concert halls, arts and entertainment centres.

2.35 **12.7%** of the spaces that host, and support culture are **heritage and environmental attractions and outdoor event spaces.**

2.36 Finally, **12.4%** are **creative open workspaces** such as rehearsal and production facilities, artist studios, makerspaces and other creative workspaces including incubator, accelerator and co-working spaces.

Figure 2.8 Cultural Infrastructure Map - All



Source: We Made That

Performance and Exhibition Spaces

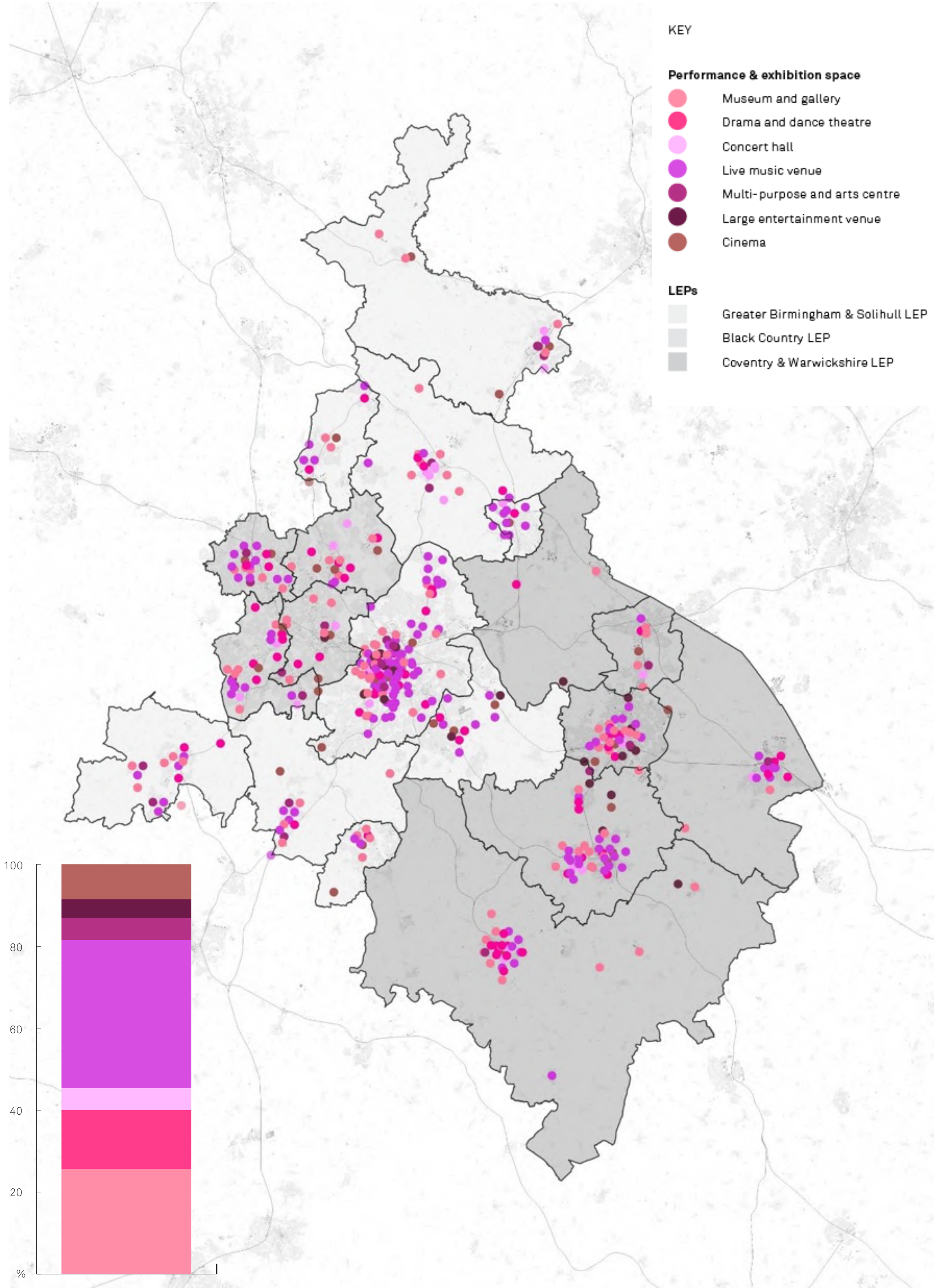
2.37 Performance and exhibition spaces provide cultural infrastructure for audiences and enable spectatorship. These spaces tend to have a cultural mandate (though that may not necessarily be their primary rationale) and are usually equipped with purpose-built facilities or equipment in order to facilitate cultural activities and events.

2.38 **514 performance and exhibition spaces** have been identified in this mapping exercise. This represents **21.5%** of the total number of spaces identified in the region.

2.39 The largest group within this category are live music venues, followed by museums and galleries. While live music venues can be found in most smaller towns as well as larger settlements, museums and galleries are relatively more concentrated in the largest urban areas. The mapping identified **74 drama and dance theatres** which range from major institutions of national significance to many popular and well-established local venues.

2.40 Overall, the largest numbers of performance and exhibition spaces can be found in the Birmingham-Wolverhampton agglomeration, Royal Leamington Spa, Warwick and Coventry. These are areas with sufficient population, or a substantial visitor economy needed to support specialized facilities.

Figure 2.9 Performance & Exhibition Spaces



Source: We Made That

Community, Participatory and Education Spaces

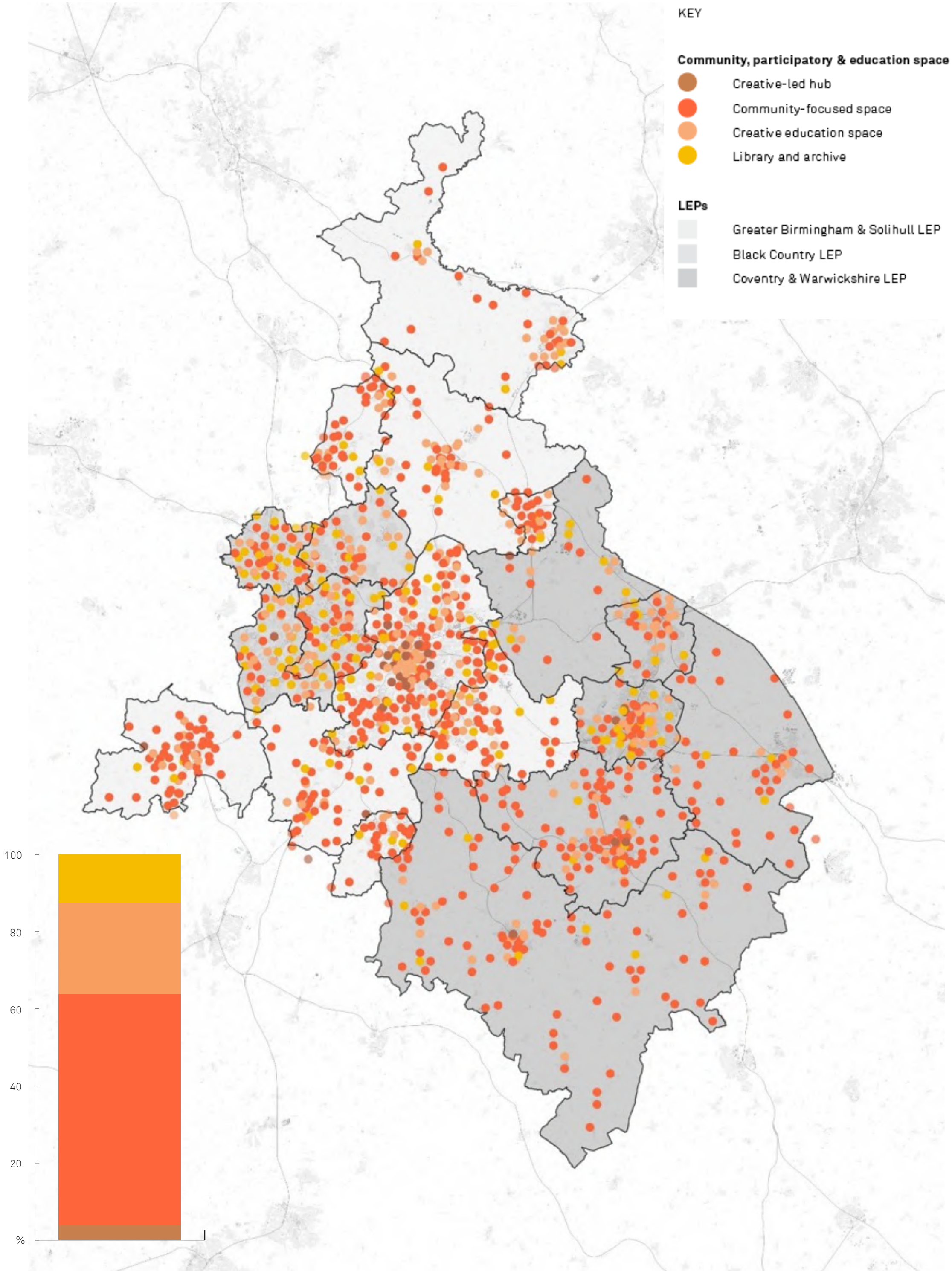
2.41 This typology focuses on spaces where cultural and creative activities are facilitated or accessed in a participatory or communal manner. They constitute the infrastructure that underpins both the self-directed and interactive participation of individuals or groups in culture or creative practice and the education and development across the range of creative disciplines (e.g. art. drama, music and film).

2.42 **1,274 community, participatory and education spaces** have been identified in this mapping exercise. This represents **53.4%** of the total number of spaces identified in the region.

2.43 **6 in 10 spaces in this category are community-focused facilities**, including many community centres and village halls that regularly host cultural activities. Community-focused facilities are the most common as well as the most spatially dispersed type of cultural infrastructure in this mapping. Across the region, there are **more than 750 spaces** in this category, covering large urban areas as well as a substantial share of villages and small settlements. The cultural offer in these spaces caters for a wide spectrum of audiences and often includes regular arts, crafts or dance classes. In rural areas, local community spaces are often a key cultural asset.

2.44 The second most frequent typology in this category is creative education spaces including dedicated music, dance and theatre school facilities. Furthermore, there are **180 libraries and archives** across the study area. While not as prevalent as community-focused spaces, specialised creative education facilities and libraries also cover a variety of geographies and can be found in most towns and some larger villages.

Figure 2.10 Community, Participatory and Education Spaces



Source: We Made That

Open Creative Workspaces

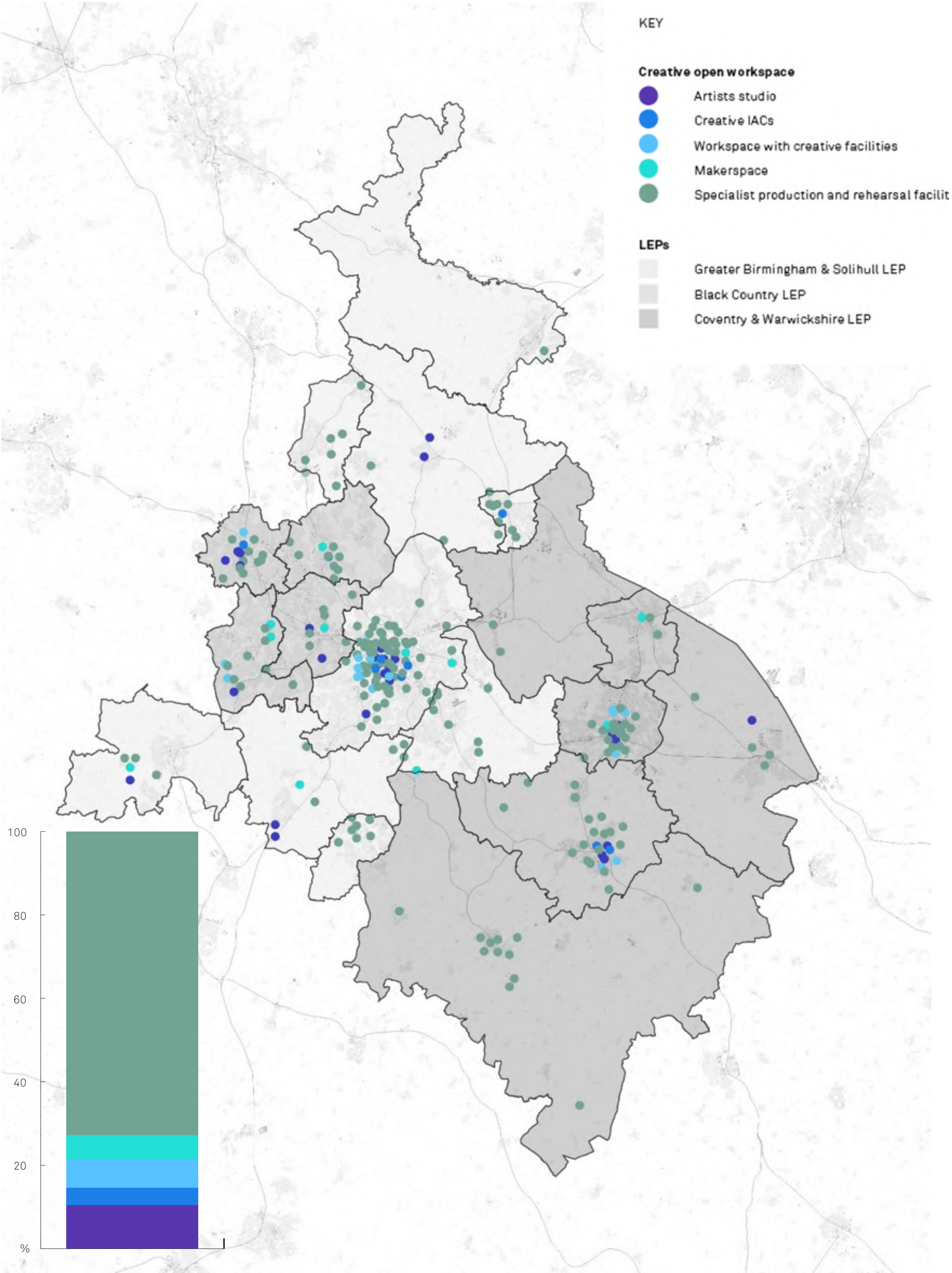
2.45 This typology focuses on managed workspaces which are either explicitly targeted to artists or creative tenants, or which provide facilities for creative creation or production. These workspaces are operated by a provider of some form and should be bookable or use-able by individuals, organisations or companies.

2.46 **295 creative open workspaces** have been identified in this mapping exercise. This represents **12.4%** of the total number of spaces identified in the region.

2.47 Three-quarters of these are rehearsal spaces and specialist production facilities for music and other media. Specialist production and rehearsal facilities represent a significant share of cultural infrastructure in the region and can be found in as well as outside of urban areas, the latter especially in the case of music rehearsal and recording facilities which are prevalent across the region.

2.48 Other spaces in this category include artist studios, makerspaces and other open cultural production facilities. These spaces are more spatially concentrated in large urban areas with sufficient demand for specialised creative workspace – Birmingham, Wolverhampton, Royal Leamington Spa, Coventry. Despite being less frequent, these facilities are indispensable to cultural production in the region.

Figure 2.11 Open Creative Workspace



Source: We Made That

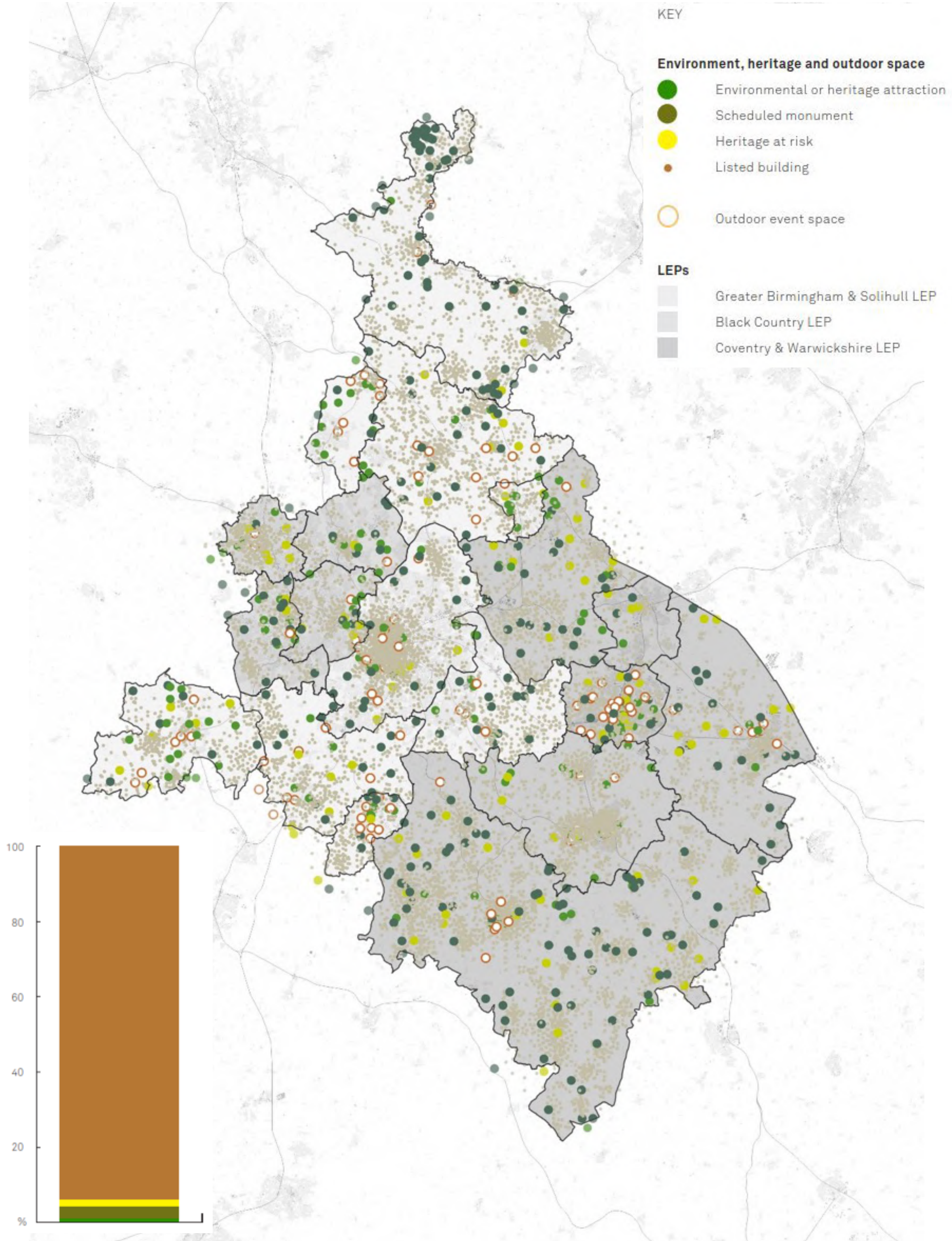
Environment, Heritage & Outdoor Spaces

2.49 The location of ‘heritage, environment and outdoor spaces’ spans: regular festival spaces, open public spaces regularly used for cultural events, as well as tangible environmental and heritage assets. The key attribute of these spaces is that they provide opportunities for community members to experience cultural assets and activities outside traditional cultural venues.

2.50 **303 outdoor event spaces and heritage and environmental attractions** have been identified in the region. This represents 12.7% of the total number of spaces identified. In addition, there are **10,579 heritage sites and buildings**, including 329 scheduled monuments, 25 heritage parks or gardens, and 117 listed buildings at risk.

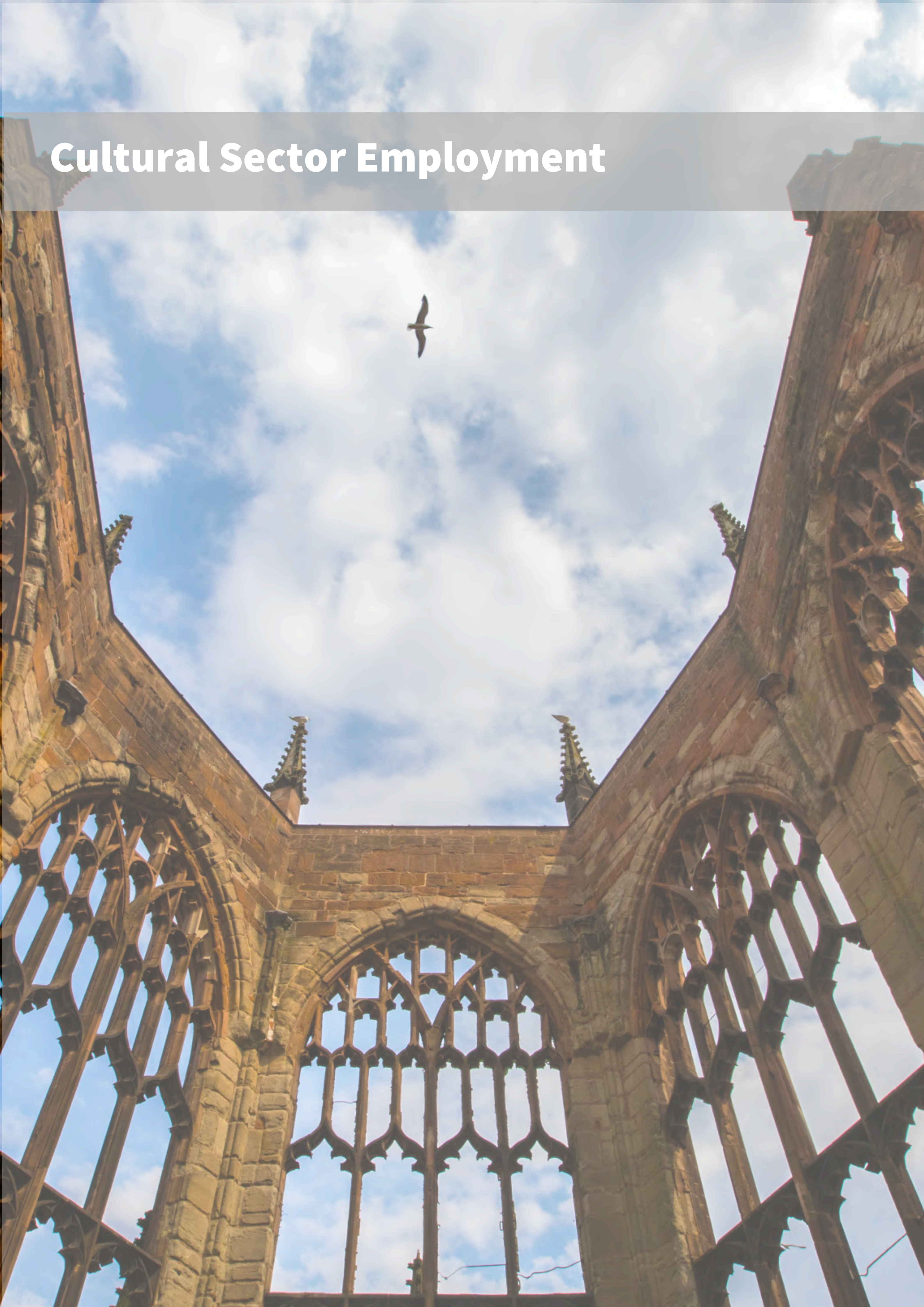
2.51 Unlike most performance, exhibition or cultural production spaces, heritage and environmental attractions, as well as outdoor event spaces, are relatively dispersed across the region. As such, these represent popular travel destinations both locally and, in some cases, nationally. Some of the outdoor event spaces host popular festivals which regularly attract large numbers of visitors. This is the case both in large urban areas and in other towns with a distinct cultural offer such as Stratford-upon-Avon or Lichfield.

Figure 2.12 Environment, Heritage & Outdoor Spaces



Source: We Made That

Cultural Sector Employment



3. Cultural Sector Employment

Key Findings

- There are **16,320 people employed** in the cultural sector across the WMCA region. The sector accounts for approximately 0.9% of the total employment across the area, although **supports a much wider number of jobs,** as this underestimates the size of the freelancer economy (which is substantial in the sector) and wider spillover effects (see chapter 7). This includes a range of occupations (e.g. cultural organisations employ accountants and retail professionals as well as core cultural professionals)
- Estimates from elsewhere suggest that the cultural sector could have up to an **additional 50% headcount** once freelancers are included
- The **WMCA area has one of the largest cultural sectors** when compared to other combined authority areas across the country, and the sector's employment share is roughly equal to that of the Liverpool City Region and West Yorkshire Combined Authority areas
- A **large proportion** of the area's cultural employment is based in Birmingham, with other hotspots of activity in Stratford-on-Avon, Warwick and Coventry
- The cultural sector has been **rapidly growing** over the last five years (+20%) exceeding the national growth rate (+12%) and the wider economy growth rate for the WMCA area (+5%)
- COVID-19 has had a **significant impact** on the cultural sector, with around a third of employees currently taking up the Coronavirus Job Retention Scheme (CJRS) and the number of job postings down by 29% since 2019
- The cultural sector workforce has a much **higher proportion of part-time workers** relative to other sectors of the economy (with noticeable exceptions in Stratford-on-Avon and Lichfield)
- There is a **relative lack of diversity** amongst the cultural sector workforce, with under-representation from ethnic minority groups and lower socio-economic backgrounds

3.1 This section provides analysis on the cultural sector employment across the WMCA region, understanding the scale and specialisation across the area and the diversity across the cultural workforce.

3.2 As mentioned in the introduction, much of this data highlights the pre-COVID position of the area, with the cultural sector being particularly hard hit by COVID-19 and restrictions imposed. Cultural employment has been particularly hard hit by the crisis, with around a third of employees in the cultural sector on furlough in December 2020.[2] Many workers within the sector are currently being supported by a number of government initiatives, including the Coronavirus Job Retention Scheme (CJRS) and Self-Employment Income Support Scheme (SEISS).

[2] Coronavirus Job Retention Scheme, ONS, December 2020

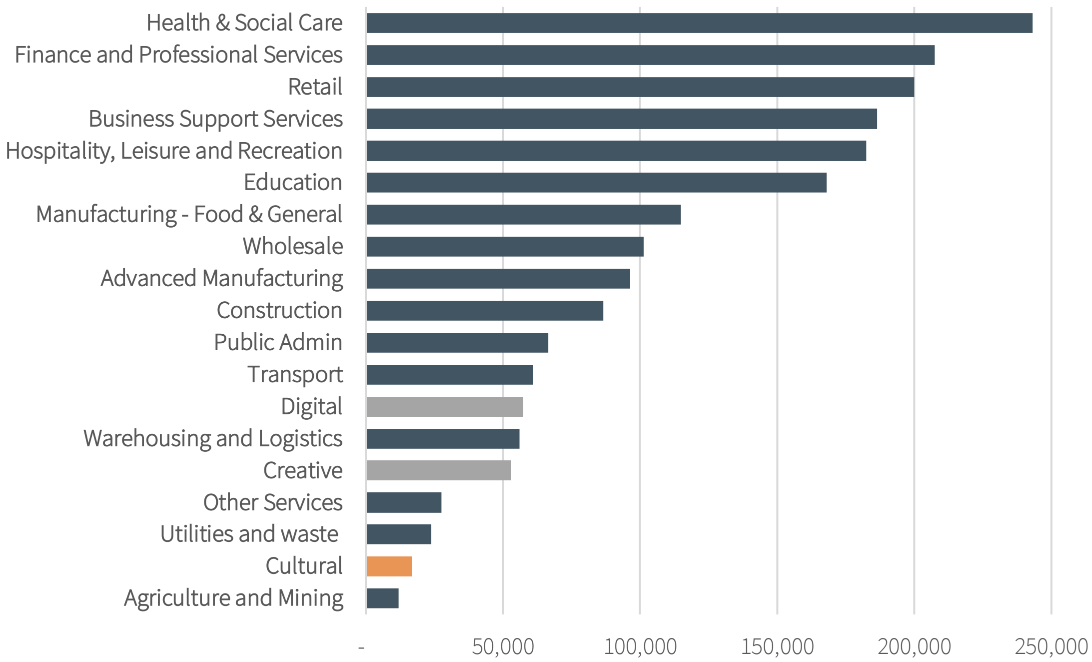
3.3 Therefore, whilst this section does refer to some of the emerging data relating to the post-COVID position (where possible), much of this refers to cultural employment and diversity prior to COVID-19.

Employment in the WMCA Area

Cultural employment is dominated by Birmingham in the WMCA area, but with niche clusters of activity across the region…

3.4 Based on the latest ONS data available (for 2019), 16,320 people were employed in the cultural sector in the WMCA area, equivalent to 0.9% of total employment in the area. It should be noted that this covers a range of occupations within the relevant SIC codes (e.g. organisations classed within the cultural sector will employ roles including accountants and retail professionals as well as core cultural occupations). Figure 3.1 sets this out in comparison to other broadly defined sectors in the area.

Figure 3.1 Employment by Sector in WMCA area, 2019



Source: BRES, ONS, 2019. Note: includes all cultural sub-sectors (as defined by DCMS)

3.5 The WMCA area has one of the largest cultural sectors when compared to other combined authority areas across the country, and the sector's employment share is roughly equal to that of the Liverpool City Region and West Yorkshire Combined Authority areas.

Table 3.1 Employment Share of Cultural Sector in Other Combined Authority Areas

	Cultural sector	All employment (millions)	% of total
Cambridgeshire and Peterborough	4,000	0.5	0.9%
Greater Manchester	21,000	1.4	1.5%
West of England	7,000	0.5	1.3%
North of Tyne	5,000	0.4	1.3%
Liverpool City Region	7,000	0.7	1.0%
West Yorkshire	11,000	1.1	1.0%
West Midlands	**16,320**	**1.8**	**0.9%**
North East	3,500	0.4	0.8%
Sheffield City Region	4,500	0.6	0.8%
Tees Valley	1,500	0.3	0.6%

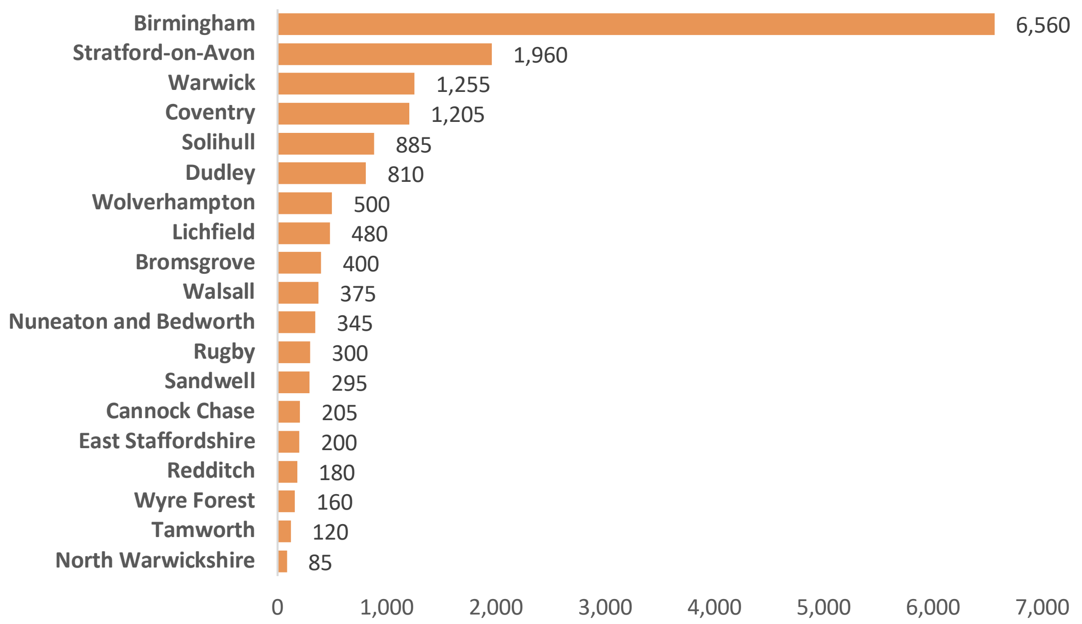
Source: ONS BRES 2019 Note: includes all cultural sub-sectors (as defined by DCMS)

3.6 It is important to note that these totals exclude freelancers, as these are not captured within published statistics. However, freelancers play a very important role in the cultural and creative economy. A recent investigation by Coventry and Warwickshire LEP found that in the creative industries, the freelance workforce is estimated to account for an additional 34% headcount across all industries and up to 50% in some sub-sectors.[3] Freelancers are examined later in this section.

3.7 A large proportion of these cultural employees are based in Birmingham (as would be expected given the city's size – we later control for this by expressing it as a share of total employment), but there are other notable pockets of activity in Stratford-on-Avon, Warwick and Coventry.

[3] Report referenced in WMREDI (2020) State of the Region 2020, report to West Midlands Combined Authority

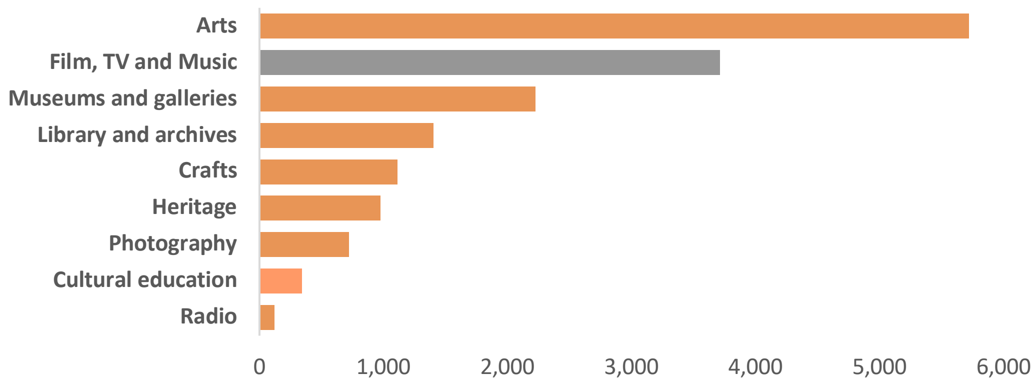
Figure 3.2 Cultural Employment by Local Authority in the WMCA area, 2019



Source: BRES, ONS, 2019. Note: includes all cultural sub-sectors (as defined by DCMS)

3.8 The cultural sector has a number of niche specialisms across the WMCA area, with a number of clusters developing across the region (we display this in detail in Tables 3.1 and 3.2). As a whole, the largest cultural sub-sectors in the WMCA area are arts (5,620 jobs) and museums and galleries (2,225). Notably, employment in the arts cultural sub-sector is much higher than that in Film, TV and Music. The representation of employment in cultural education is relatively low, but it is highly likely that some of this is captured under other categories of employment or as freelancers and so unreported in this dataset.

Figure 3.3 Cultural Employment in the WMCA area by sub-sector



Source: BRES, ONS, 2019

3.9 From Tables 3.2 and 3.3, there are a number of key observations across the WMCA area:

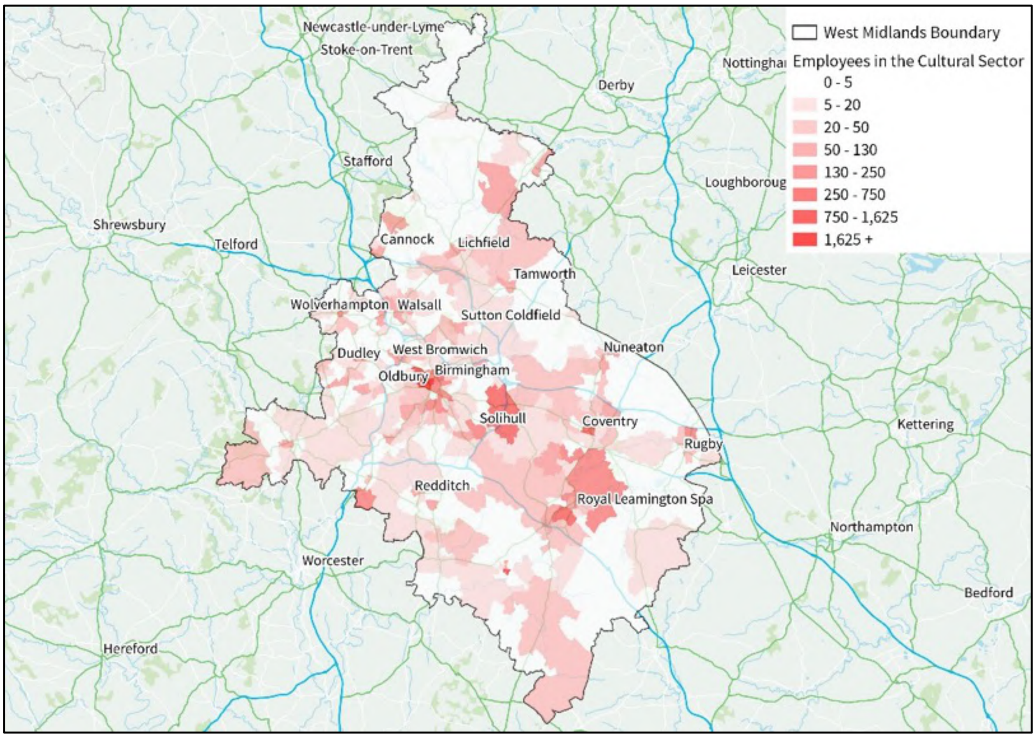
- **Arts** (performing arts, artistic creation): the sub-sector accounts for around a third of jobs in WMCA's cultural sector, but relative to the national concentration of activity, it has a relatively limited presence across most of the WMCA area, with the exception of Stratford-on-Avon (which has more than double the national concentration of activity).

- **Radio**: there is a limited presence across the WMCA area, accounting for only 120 jobs (mostly located in Birmingham).
- **Photography**: some relative strengths in Warwick, Stratford-on-Avon and Walsall, with employment at or above the national concentration of activity. Relatively small presence across the rest of the WMCA area, accounting for 715 jobs.
- **Crafts**: activity is almost exclusively concentrated around Birmingham's Jewellery Quarter, with 1,000 jobs located in this area (accounting for 90% of jobs in the WMCA area).
- **Museums & Galleries**: one of the strongest cultural sectors in the WMCA area, with a 90% higher concentration of activity than the national average and employing 2,225 people across the area. All three LEP areas have a sector specialisation above the national level, with particularly strong levels of activity in Bromsgrove, Dudley, Coventry, Lichfield and Cannock Chase.
- **Library & Archives**: this sub-sector is relatively small in size and has a relatively low presence in the WMCA area compared to the national average, with a sector specialisation of 0.3 (70% less employment compared to the national level).
- **Cultural Education**: the sector is relatively small, accounting for around 350 jobs across the WMCA area.
- **Heritage**: the heritage sub-sector is well-represented in some parts of the WMCA area, and accounts for 975 jobs across the area. Local authorities with relative strengths in the sector are Warwick, Solihull, Stratford-on-Avon and Nuneaton & Bedworth.

Cultural employment is largely concentrated in urban areas, but there is a spread across the WMCA area…

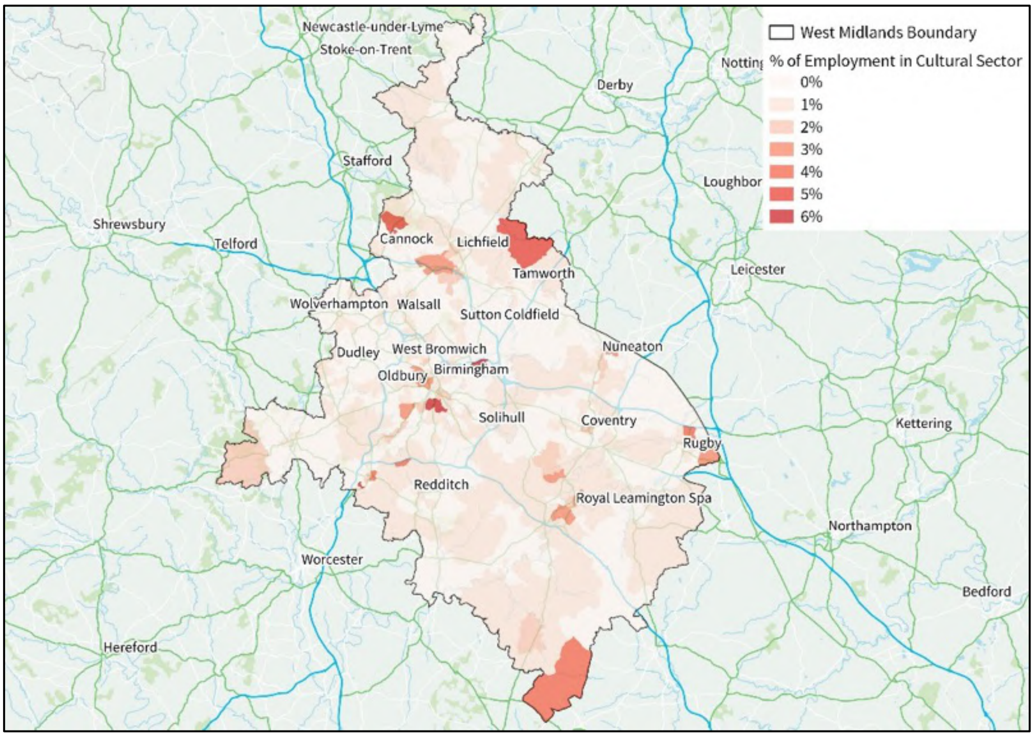
3.10 A high proportion of cultural employment is focused around urban areas, with concentrations of employment around Birmingham and Coventry City Centres and in Warwickshire. The highest density of employment can be found in Birmingham City Centre, reflecting the diversity of cultural businesses and infrastructure located in the city.

Figure 3.4 Location of Cultural Employment in WMCA area



Source: BRES, ONS, 2019

Figure 3.5 Proportion of Employment in Cultural Sector in WMCA area



Source: BRES, ONS, 2019

Table 3.2 Number of Employees in Cultural Sector

		Arts (performing arts, artistic creation)	Film, TV & Music	Radio	Photography	Crafts	Museums & Galleries	Library & Archives	Cultural Education	Heritage	**Cultural Sector (Total)**	**Cultural Sector (without Film/TV/Music)**	**Creative Sector (Total)**
Black Country LEP	Dudley	130	165	0	25	5	400	75	5	5	**810**	*645*	**2,210**
	Sandwell	45	60	0	50	5	30	100	5	0	**295**	*235*	**1,045**
	Walsall	75	80	0	50	40	100	30	0	0	**375**	*295*	**950**
	Wolverhampton	190	135	0	15	5	50	75	30	0	**500**	*365*	**1,955**
	LEP TOTAL	**440**	**440**	**0**	**140**	**55**	**580**	**280**	**40**	**5**	**1,980**	*1,540*	**6,160**
Coventry & Warwickshire LEP	Coventry	310	155	40	60	5	450	175	10	0	**1,205**	*1,050*	**4,110**
	North Warwickshire	10	25	0	0	0	0	25	0	20	**85**	*60*	**720**
	Nuneaton & Bedworth	60	50	0	5	0	90	75	45	20	**345**	*295*	**905**
	Rugby	45	195	0	5	0	0	45	19	0	**300**	*105*	**1,265**
	Stratford-on-Avon	1605	155	0	45	5	10	25	15	100	**1,960**	*1,805*	**4,035**
	Warwick	180	170	5	150	20	90	50	40	550	**1,255**	*1,085*	**4,810**
	LEP TOTAL	**2210**	**750**	**45**	**265**	**30**	**640**	**395**	**129**	**690**	**5,150**	*4,400*	**15,845**
Greater Birmingham & Solihull LEP	Birmingham	2280	1935	75	200	1,000	550	300	100	20	**6,560**	*4,625*	**17,570**
	Bromsgrove	95	35	0	10	0	225	25	5	5	**400**	*365*	**1,815**
	Cannock Chase	60	30	0	15	0	75	20	5	0	**205**	*175*	**1,260**
	East Staffordshire	25	100	0	15	5	25	25	0	5	**200**	*100*	**925**
	Lichfield	270	25	0	5	10	90	20	50	0	**480**	*455*	**1,500**
	Redditch	90	75	0	5	0	0	10	0	0	**180**	*105*	**900**
	Solihull	70	250	0	40	10	0	250	15	250	**885**	*635*	**5,580**
	Tamworth	40	50	0	5	0	10	15	0	0	**120**	*70*	**735**
	Wyre Forest	40	20	0	15	0	30	50	5	0	**160**	*140*	**500**
	LEP TOTAL	**2,970**	**2,520**	**75**	**310**	**1,025**	**1,005**	**715**	**180**	**280**	**9,190**	*6,670*	**30,785**
WMCA	**TOTAL**	**5,620**	**3,710**	**120**	**715**	**1,110**	**2,225**	**1,390**	**349**	**975**	**16,320**	*12,610*	**52,790**

Source: BRES, ONS, 2019

Table 3.3 Sector's Specialisation (Location Quotient) within the Cultural Sector

		Arts (performing arts, artistic creation)	Film, TV & Music	Radio	Photography	Crafts	Museums & Galleries	Library & Archives	Cultural Education	Heritage	**Cultural Sector (Total)**	**Cultural Sector (without Film/TV/Music)**	**Creative Sector (Total)**
Black Country LEP	Dudley	0.1	0.3	0.0	0.5	0.3	5.7	0.3	0.0	0.2	0.2	0.2	0.4
	Sandwell	0.0	0.1	0.0	0.9	0.2	0.4	0.4	0.0	0.0	0.1	0.1	0.2
	Walsall	0.1	0.1	0.0	1.0	2.3	1.6	0.1	0.0	0.0	0.1	0.1	0.2
	Wolverhampton	0.2	0.2	0.0	0.3	0.3	0.8	0.4	0.0	0.0	0.2	0.1	0.4
	LEP TOTAL	**0.1**	**0.2**	**0.0**	**0.7**	**0.7**	**2.1**	**0.3**	**0.0**	**0.1**	**0.1**	**0.1**	**0.3**
Coventry & Warwickshire LEP	Coventry	0.2	0.2	0.3	0.8	0.2	4.5	0.5	0.0	0.0	0.2	0.2	0.5
	North Warwickshire	0.0	0.1	0.0	0.0	0.0	0.0	0.3	0.0	2.0	0.1	0.0	0.3
	Nuneaton & Bedworth	0.2	0.2	0.0	0.2	0.0	3.2	0.8	0.1	2.2	0.2	0.2	0.4
	Rugby	0.1	0.7	0.0	0.2	0.0	0.0	0.5	0.0	0.0	0.2	0.1	0.5
	Stratford-on-Avon	2.5	0.4	0.0	1.3	0.4	0.2	0.2	0.0	6.7	0.8	0.9	1.1
	Warwick	0.3	0.4	0.1	3.8	1.4	1.8	0.3	0.0	33.3	0.5	0.5	1.2
	LEP TOTAL	**0.6**	**0.3**	**0.1**	**1.2**	**0.4**	**2.2**	**0.4**	**0.0**	**7.4**	**0.4**	**0.4**	**0.7**
Greater Birmingham & Solihull LEP	Birmingham	0.5	0.7	0.2	0.8	11.4	1.7	0.3	0.0	0.2	0.4	0.3	0.7
	Bromsgrove	0.2	0.1	0.0	0.4	0.0	7.3	0.3	0.0	0.5	0.3	0.3	0.8
	Cannock Chase	0.2	0.1	0.0	0.8	0.0	3.0	0.2	0.0	0.0	0.2	0.2	0.6
	East Staffordshire	0.0	0.3	0.0	0.5	0.0	0.7	0.2	0.0	0.4	0.1	0.1	0.3
	Lichfield	0.7	0.1	0.0	0.2	1.2	3.0	0.2	0.1	0.0	0.3	0.4	0.7
	Redditch	0.3	0.3	0.0	0.3	0.0	0.0	0.1	0.0	0.0	0.1	0.1	0.5
	Solihull	0.1	0.3	0.0	0.6	0.4	0.0	0.9	0.0	8.9	0.2	0.2	0.8
	Tamworth	0.2	0.3	0.0	0.4	0.0	0.6	0.3	0.0	0.0	0.1	0.1	0.5
	Wyre Forest	0.1	0.1	0.0	0.9	0.0	1.3	0.7	0.0	0.0	0.1	0.1	0.3
	LEP TOTAL	**0.4**	**0.5**	**0.1**	**0.7**	**6.2**	**1.7**	**0.4**	**0.0**	**1.5**	**0.3**	**0.3**	**0.7**
WMCA	**TOTAL**	**0.4**	**0.4**	**0.1**	**0.8**	**3.5**	**1.9**	**0.4**	**0.0**	**2.6**	**0.3**	**0.3**	**0.6**

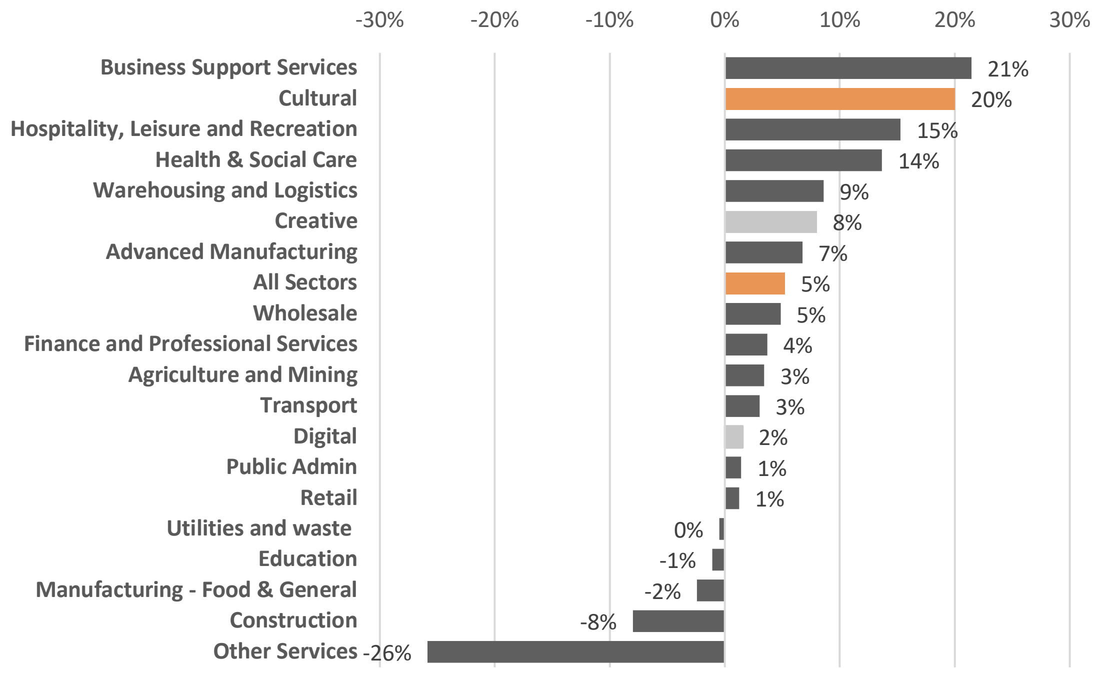
Source: BRES, ONS, 2019

Recent Employment Growth

Culture has been a rapidly growing sector in the WMCA area over the last few years, outperforming nearly every sector…

3.11 Over the period 2015 to 2019 the culture sector in the WMCA area has experienced substantial growth in overall employment, increasing by 20%. Relative to other sectors of the economy, the cultural sector has been the second fastest growing sector, only behind business support services (21%), with the sector outperforming the creative (+8%) and digital (+2%) between 2015 and 2019.

Figure 3.6 Cultural sector's performance relative to other sectors, WMCA area, 2015-19



Source: BRES, ONS, 2019 Note: includes all cultural sub-sectors (as defined by DCMS)

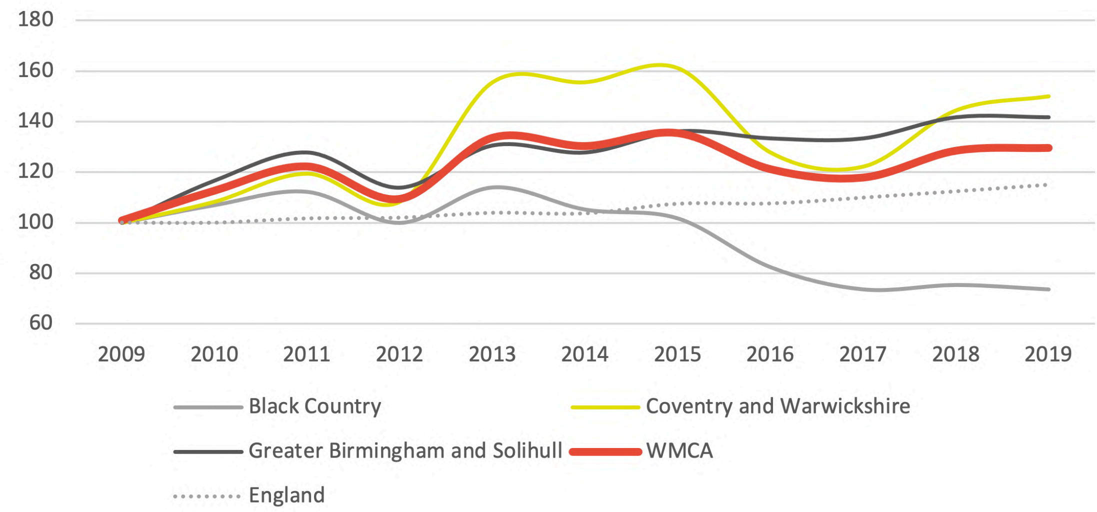
3.12 Recent growth in the WMCA area's cultural sector has outperformed the national growth rate, with the area's 20% employment growth rate outperforming the national growth rate between 2015 and 2019 (12%).

3.13 Over the last decade, employment in the cultural sector in the WMCA area has fluctuated, with all 3 LEP areas exhibiting some of the strongest levels of growth between 2013 and 2014, and between 2018 and 2019. There are a number of noticeable trends in the data:

- **Greater Birmingham and Solihull** has experienced the most stable growth trajectory over the last decade, with 60% growth in cultural employment between 2009 and 2019.
- **Coventry and Warwickshire** has experienced strong fluctuations in cultural employment, although there has been strong growth over the last two years.

- **The Black Country** has experienced declining cultural employment over the last five years, with a steady decline from 2014 to 2018. However, there was some resurgence in 2019, the first year of employment growth since 2013.

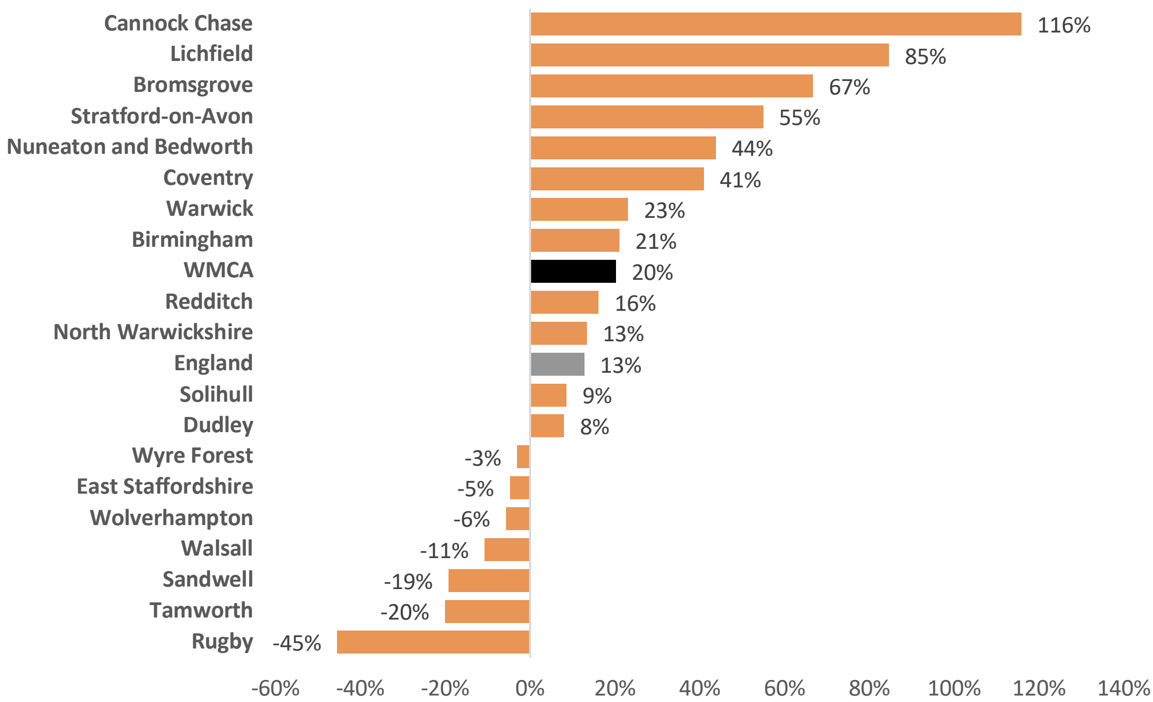
Figure 3.7 Historic Cultural Employment Growth Rate, Three-Year Rolling Average, 2009-19, Indexed (2009 = 100)



Source: BRES, ONS, 2019 Note: Indexed data, where 2009 employment level = 100

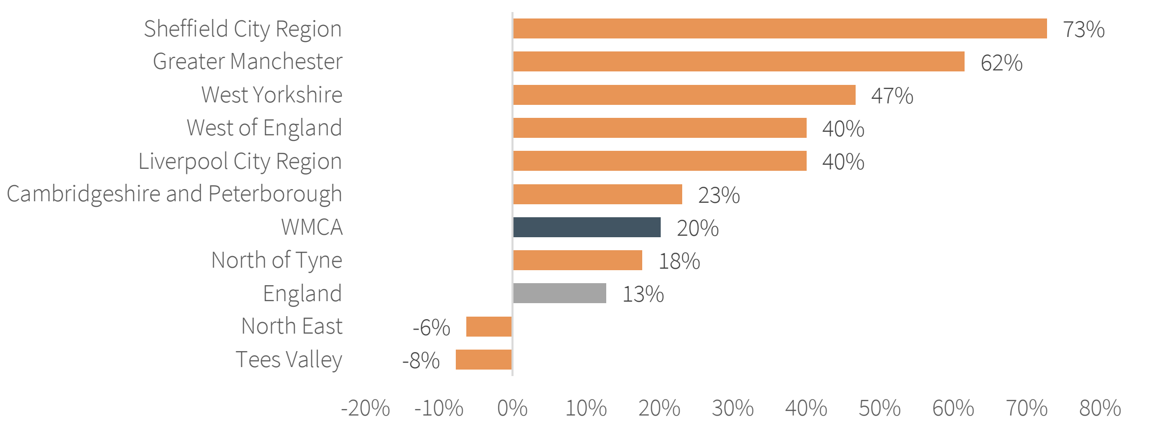
3.14 At a local authority level there have been varying levels of growth within the cultural sector. Local authority areas that have experienced exceptionally high growth rates since 2015 include Cannock Chase, Lichfield, Bromsgrove, Stratford-on-Avon, Nuneaton & Bedworth and Coventry. All of these areas have experienced 40%+ growth since 2015.

Figure 3.8 Employment growth within the cultural sector by Local Authority, 2015-2019



Source: BRES, ONS, 2019 Note: includes all cultural sub-sectors (as defined by DCMS)

Figure 3.9 Employment growth within the cultural sector by Combined Authority Area, 2015-19



Source: BRES, ONS, 2019 Note: includes all cultural sub-sectors (as defined by DCMS)

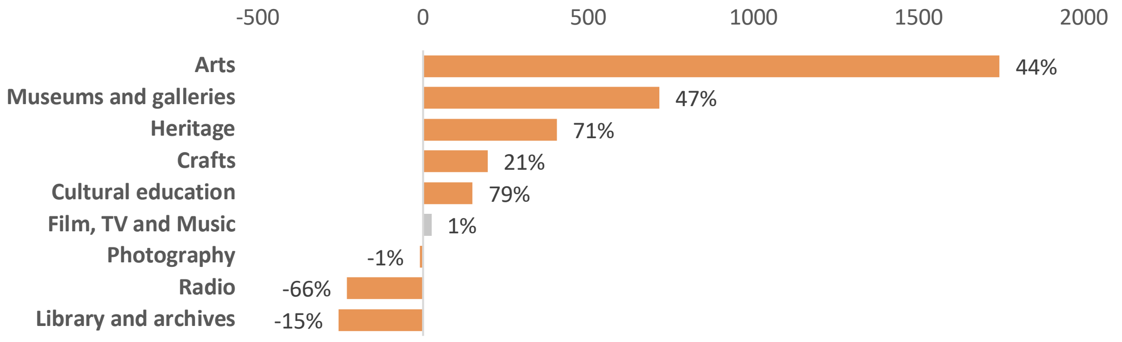
3.15 Employment within the cultural sector in the WMCA area has not grown as rapidly as other combined authority areas over the past five years.

Employment Growth by Sub-Sectors

Strong growth across a range of sub-sectors…

3.16 The recent growth in the cultural sector across the WMCA area has occurred over a range of different cultural sub-sectors. Arts has been the strongest growing sub-sector (in absolute terms), with 1,745 more jobs in 2019 compared to 2014 (a 44% increase). Other strong growing sub-sectors are museums and galleries (+715 jobs, 47% growth), heritage (+405 jobs, 71% growth) and crafts (+195 jobs, 21% growth). Sub-sectors which have experienced a decline in employment are library and archives (-255 jobs, -15% decline) and radio activities (-230 jobs, -66% decline). This data does not include the employment changes in freelancers within these sub-sectors, the graph below is therefore indicative and may not represent the actual growth in these sub-sectors.

Figure 3.10 Employment Growth by Cultural Sub-Sector (% Growth also shown), 2014-19

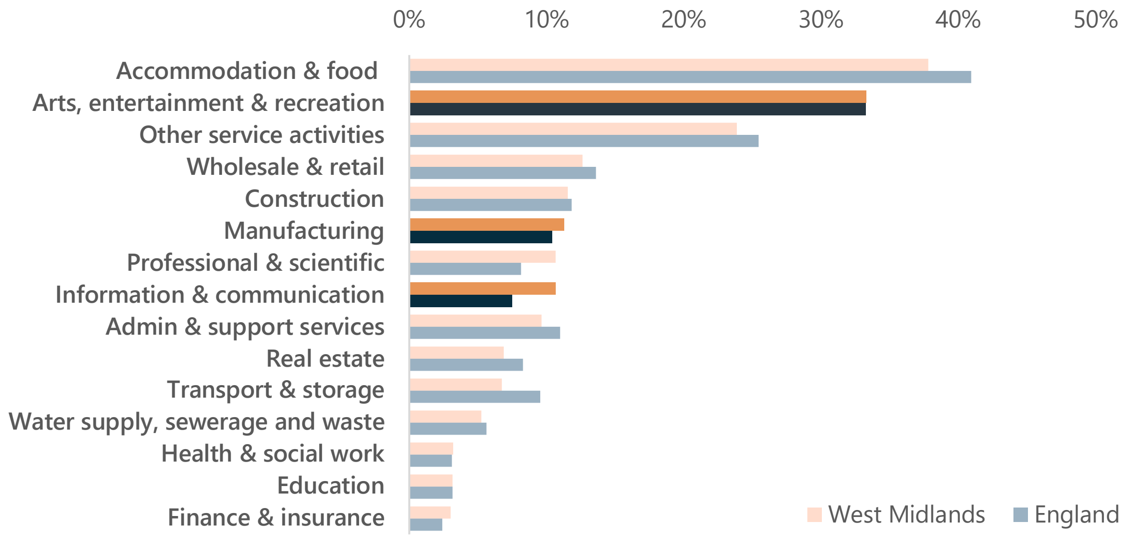


Source: BRES, ONS, 2019

But COVID-19 has had a significant impact on the cultural sector…

3.17 COVID-19 has had a significant impact on the cultural sector, with this impact not yet reflected in the latest national employment datasets. Data from the Coronavirus Job Retention Scheme (CJRS) shows that the cultural sector is one of the most impacted by the crisis, with around a third of employees in the sector taking up the CJRS in December 2020.

Figure 3.11 Take-up of coronavirus Job Retention Scheme by sector, December 2020

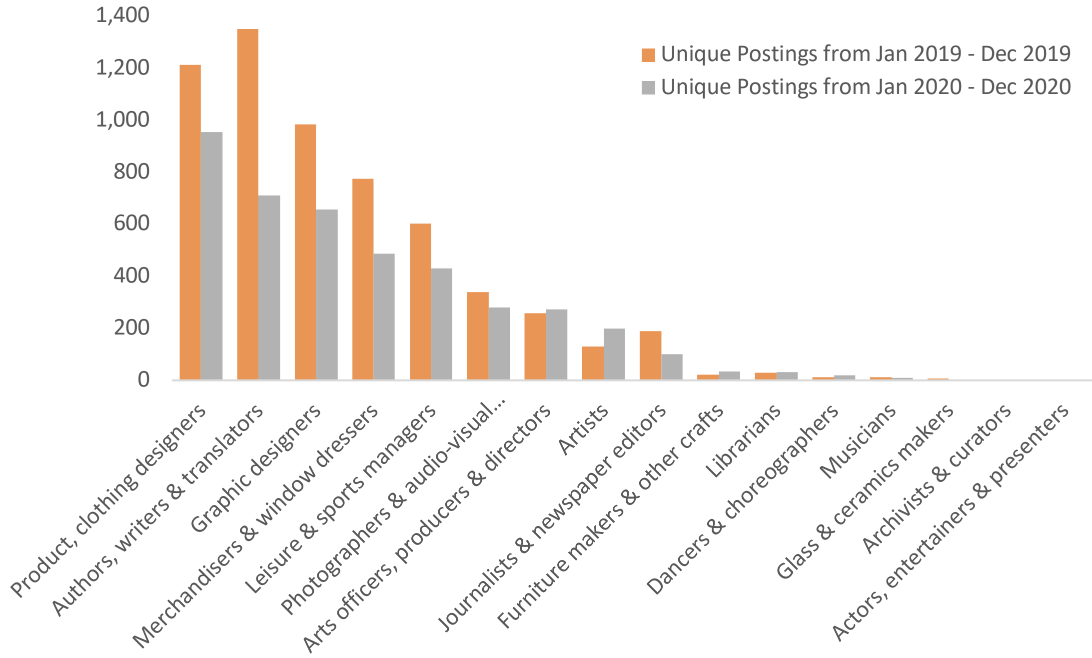


Source: Coronavirus Job Retention Scheme Statistics, 2020
Note: 63% of cultural activity in the West Midlands is classified as 'arts, entertainment & recreation', 29% as

'information & communication' and 8% as 'manufacturing' – hence these bars have been highlighted to spotlight the cultural sector.

3.18 The number of job postings has also been hit by the crisis, with a 29% reduction in the number of postings between 2019 and 2020. This reduction has been felt across the vast majority of cultural occupations, with the strongest reduction in job postings being authors, writers and translators (-47%), journalists & newspaper editors (-47%), merchandisers & window dressers (-37%) and graphic designers (-33%).

Figure 3.12 Unique Job Postings within the West Midlands for Cultural Occupations



Source: EMSI, 2021

Characteristics of Cultural Employment

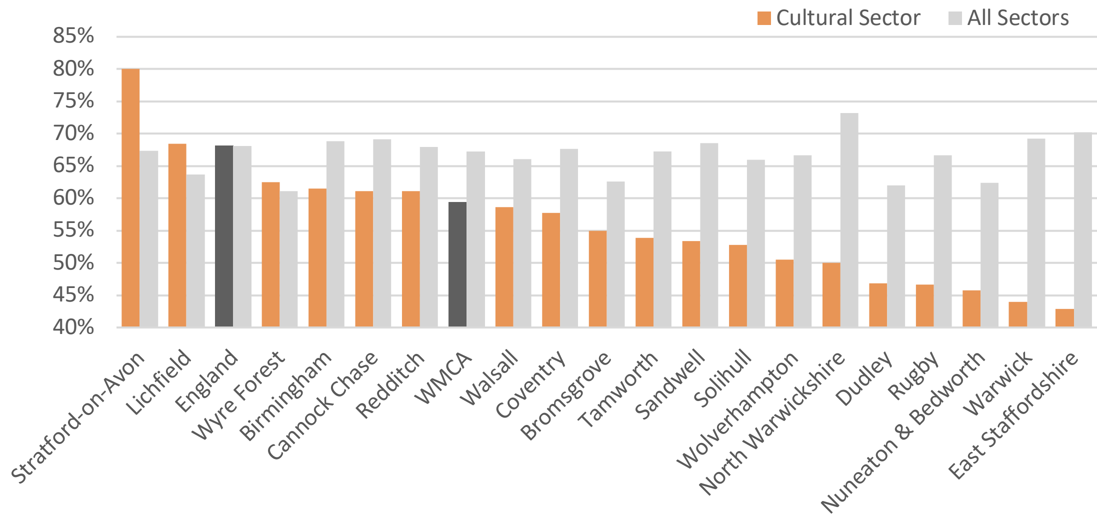
3.19 This section examines some of the key characteristics of the cultural workforce, particularly analysing data relating to the diversity of the workforce.

The cultural sector has a high proportion of part-time workers…

3.20 Within the WMCA area's cultural sector, 59% of workers are full-time, compared to 67% across the rest of the economy. This partly reflects the seasonal nature of some cultural employment, and the age profile of those working within the sector. The level of full-time working in the WMCA area's cultural sector is 8% points lower than for England, suggesting that the sub-sector make-up of the sector also impacts on the level of full-time work available.

3.21 Across the region, there is considerable variation in the level of full-time working within the cultural sector. Stratford-on-Avon has the highest proportion of full-time work in the cultural sector, reflecting the year-round nature of its offer. Lichfield and Wyre Forest also have relatively high levels of full-time employment in the cultural sector, around the national average. By comparison in all other local authorities, the rate is below the national average, but also below the level within the wider economy.

Figure 3.13 % of Cultural Employment that is **Full-Time**, 2019

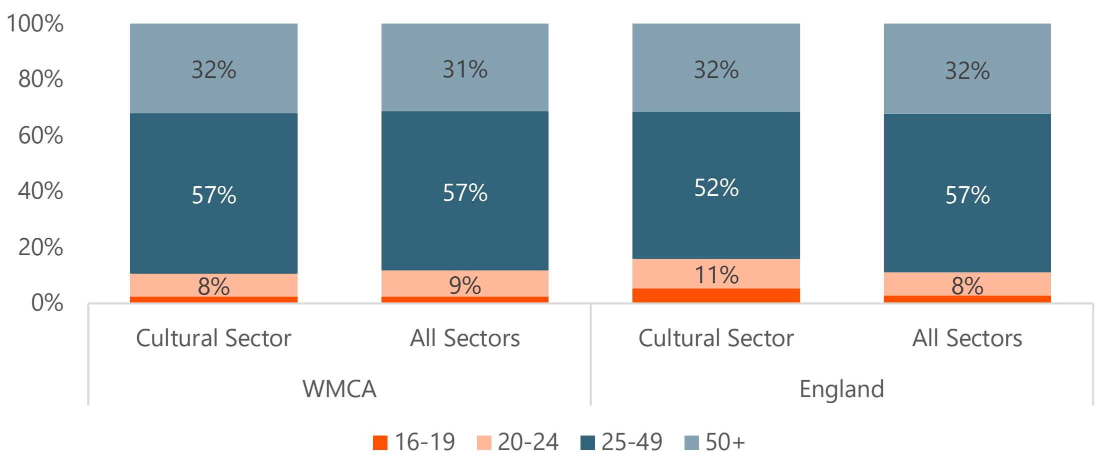


Source: BRES, ONS, 2019 Note: includes all cultural sub-sectors (as defined by DCMS)

The age profile of workers in the cultural sector is slightly older than average...

3.22 The cultural sector in the WMCA area has a similar age profile to the rest of the economy, with 57% of workers being between the ages of 25 and 49. But there is a slightly older age profile relative to the national level, with only 52% of workers being 25 to 49 nationally, and with only 10% of workers being aged 16 to 24 compared to 16% nationally.

Figure 3.14 Age Profile of the Cultural Workforce

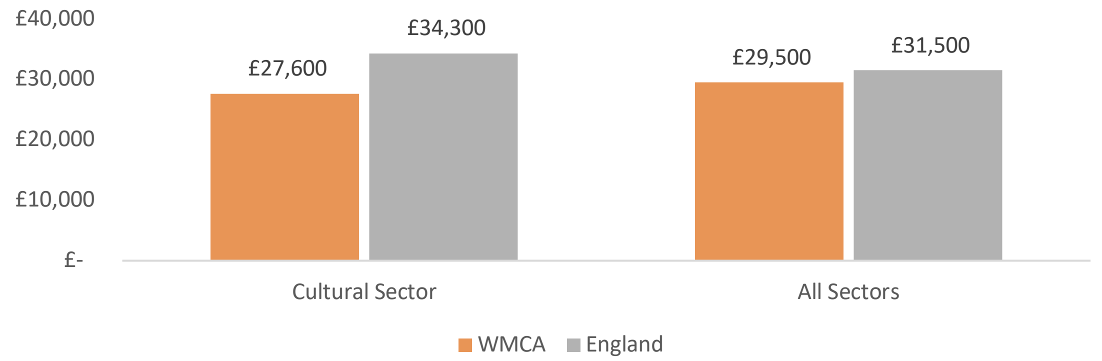


Source: Annual Population Survey, ONS, 2020 Note: includes all cultural sub-sectors (as defined by DCMS)

Earnings for those in the cultural sector are below the national level and the wider economy...

3.23 Average earnings for WMCA area's full-time workers in the cultural sector are 20% lower than across the rest of the economy, with the average full-time worker in the cultural sector earning £27,600. Workers in WMCA area's cultural sector currently earn 6% less than the average national cultural wage. This is a larger wage gap compared to that experienced across the rest of the economy.

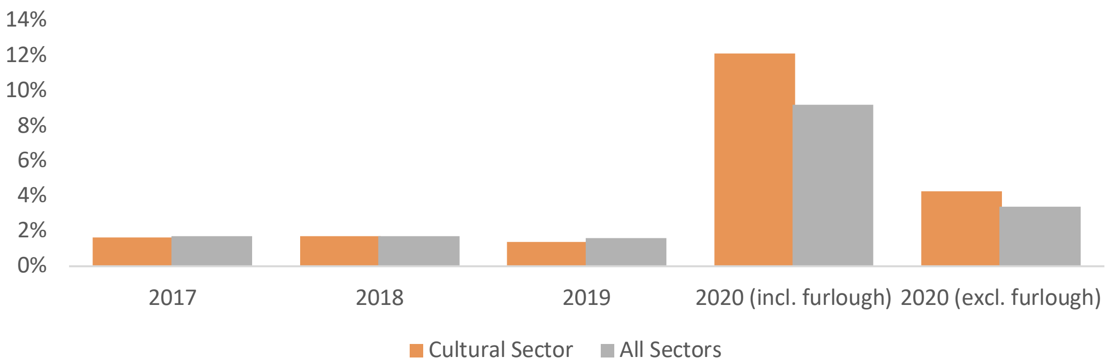
Figure 3.15 Average Earnings in the Cultural Sector



Source: Annual Survey of Hours and Earnings, ONS, 2020 Note: includes all cultural sub-sectors (as defined by DCMS)

3.24 Data relating to the proportion of workers earning lower than the national minimum wage shows that the cultural sector nationally generally performs well, with less than 2% of workers earning below the national minimum wage in 2017-19. However, the impact of COVID-19 can clearly be seen in 2020, particularly the strong impact on the cultural sector, with more than 13% of the cultural workforce nationally now earning less than the national minimum wage (when incorporating those on currently on furlough). COVID-19 has strongly impacted on the cultural workforce, more so than across other sectors of the economy.

Figure 3.16 % of Workers Earning Lower than National Minimum Wage, England



Source: Low Paid Jobs by Sector, ONS, 2020

The cultural sector has a high proportion of self-employed and freelancers…

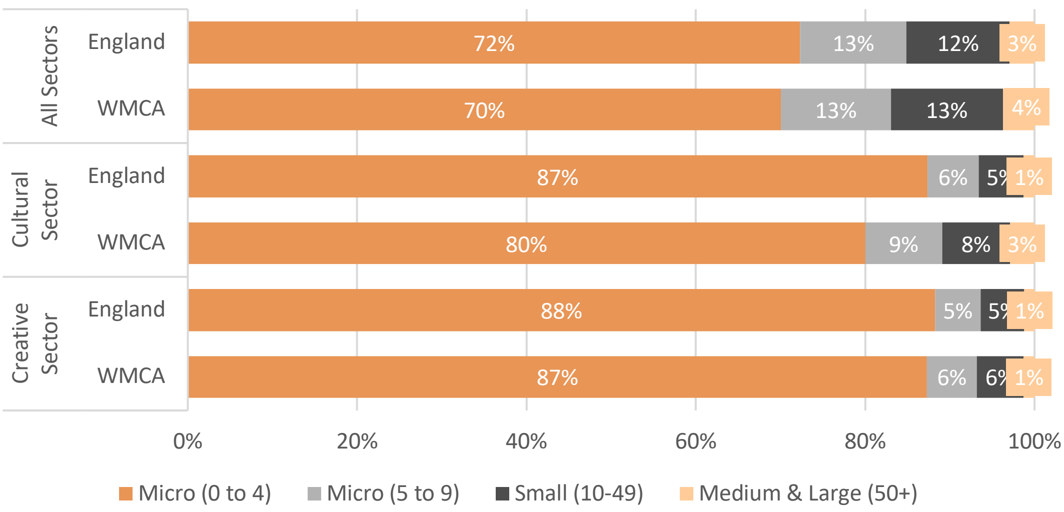
3.25 It is widely recognised that there is a high proportion of self-employment within the cultural sector, with 47% of workers across the wider creative industries being self-employed, compared with 15% across the workforce as a whole[4]. Many activities within the cultural sector (especially arts and crafts, photography, music and dance) tend lend themselves to operating as firms with employees, rather individuals have portfolio careers in which they work across a number of different companies.

[4] Creative Freelancers, Creative Industries Federation, 2019

3.26 The challenge for the cultural sector is that despite their importance, freelancers are grossly under-recorded in official datasets, given many do not have to register for VAT or PAYE.

3.27 Data from the UK Business Count shows the number of employees hired by businesses in the cultural sector and the wider economy. This shows that around 80% of cultural businesses employing between 0 and 4 employees. However, this data only measures those who have registered for VAT or PAYE.

Figure 3.17 Business Sizes of Cultural Businesses, 2020



Source: UK Business Count, ONS, 2020

3.28 Recent research by the Creative Industries Federation on Creative Freelancers sought to understand more about the sectors in which freelancers were most commonly used. The cultural sectors within this analysis have been highlighted in the table below.

Table 3.4 Usage of Freelancers by Cultural Sub-Sector

Cultural Sub-Sector	Typical Usage of Freelancers
Performing Arts	• The project-based nature of productions in the performing arts means that the subsector relies on an enormous number of freelancers. • The **theatre** and **dance** sectors use large numbers of freelancers in all parts of theatrical development: from freelance dancers and actors to technical and graphic designers as well as catering and front of house staff. • Around a third of the membership of BECTU, the union for offstage and technical workers in entertainment, is freelance and it is the norm among many creative roles in theatre. • Freelancing is also important for the festival sector. The vast majority of those working in the festival sector are freelancers – performers, creatives, producers, programmers and project managers. This is because the inevitable seasonal and one-off nature of festivals means there is a lack of full-time, year-round employment.

Crafts	• Crafts Council figures show that 88% of makers are sole traders. • Many working in crafts have ‘portfolio careers,’ with 50% of crafts graduates in multiple jobs, typically combining employment with self-employment, study or developing their creative practice. • Crafting Futures, a study of the early careers of crafts graduates from UK higher education institutions, found that 37% of crafts graduates had worked freelance since graduating and at the time of the survey 15% were still doing so
Film, TV, Radio & Photography	• Freelancing is common across the screen industries. In a report on the Bristol screen industry, the University of the West of England found that 50% of the 600 people they talked to in the sector were freelance • According to Creative Skillset’s 2015 employment survey of the UK’s creative industries, 89% of all workers in the film production sector are freelancers • Many photographers are also freelance, and work a number of jobs throughout the year
Museums, Galleries & Libraries	• Museums and libraries have lower rates of self-employment than other areas of the creative economy but there is still a need for freelance workers in a number of roles, including craftspeople, designers and tutors to support public programmes • The cultural heritage sector sees very low levels of self-employment since individuals tend to be tied to particular institutions • Galleries tend to employ a number of freelancers, particularly in developing new exhibitions and arts displays.
Music	• For much of the music industry –producers, publishers, technicians, musicians, managers, composers, live performers – working freelance is almost the default. • In 2011 a major survey showed that more than half of all music industry employees were under 44 and working in small organisations. Of these, 44% were categorised as self-employed.

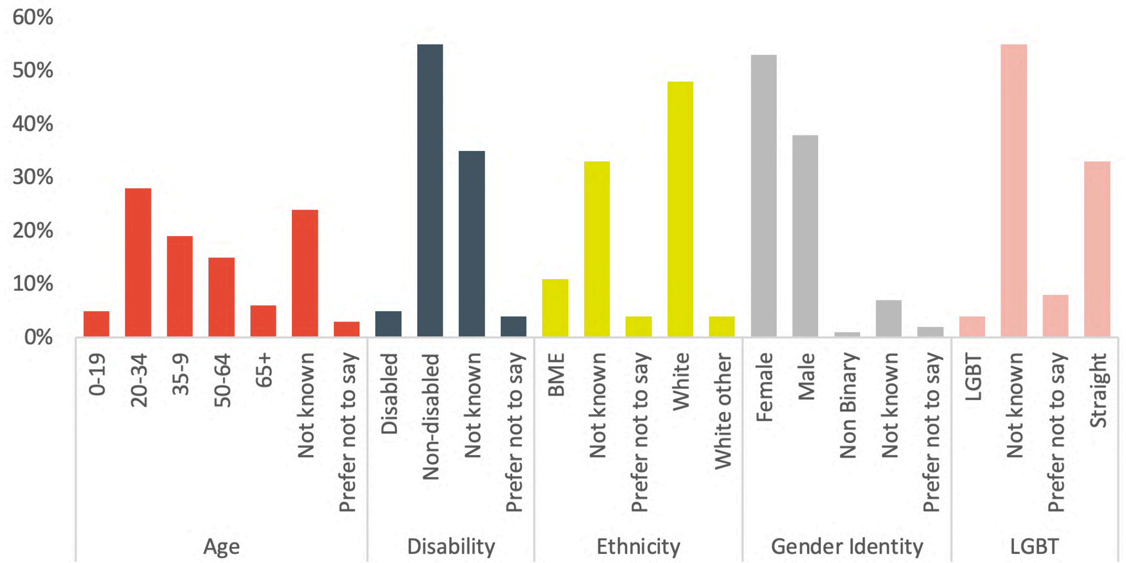
Source: Creative Freelancers, Creative Industries Federation, 2019

There is a relative lack of diversity amongst the cultural sector workforce…

3.29 There is no single data source that specifically monitors the inclusiveness of the cultural sector’s workforce. Survey data released by Arts Council England provides on overview of the diversity of the workforce within National Portfolio Organisations (of which there are 37 within the WMCA area). Although this does not provide a perfect reflection of the diversity of the WMCA area’s cultural workforce, it provides an indication as to the characteristics of people working within the sector.

3.30 This data shows that whilst there is a diverse range of people employed by the National Portfolio Organisation in the Midlands (126 NPOs), this does not fully reflect the diversity of the general population. Relative to the rest of the population, there is an under-representation of those from ethnic minority backgrounds and those identifying as having a disability.

Figure 3.18 Diversity Indicators for Workforce in National Portfolio Organisations in the West Midlands Region



Source: National Portfolio Organisations Annual Diversity Report, Arts Council England, 2019

3.31 At the national level, there is an under-representation of people from ethnic minorities, female and lower socio-economic backgrounds in the cultural sector, although this does vary considerably depending on the cultural sub-sector. Crafts and film, TV, video, radio & photography have the highest underrepresentation of females, accounting for around a quarter of the workforce nationally. Those from lower socio-economic backgrounds are also less likely to be in the cultural sector (with the exception of craft occupations), with less than half of all workers coming from households which had no parent in an occupation above intermediate level (NS-SEC 3-8).

Table 3.5 Composition of Cultural Workforce, Nationally

	% ethnic minority	% Women	NS-SEC 1 Parents	NS-SEC 2 Parents	NS-SEC 3-5 Parents	NS-SEC 6-8 Parents
Crafts	6%	22%	11%	12%	46%	32%
Film, TV, Video, Radio & Photography	4%	28%	26%	29%	34%	12%
Museums, Galleries & Libraries	3%	65%	26%	28%	22%	21%
Music, Performing & Visual Arts	5%	42%	29%	21%	32%	18%
Rest of the Economy	*9%*	*48%*	*21%*	*20%*	*35%*	*24%*

Source: Oakley, K., Laurison, D., O'Brien, D. and Friedman, S. (2017) 'Cultural Capital: Arts Graduates, Spatial Inequality, and London's Impact on Cultural Labor Markets', *American Behavioral Scientist*
Note: NS-SEC 1 Higher managerial and professional occupations
NS-SEC 2 Lower managerial and professional occupations
NS-SEC 3-5 Intermediate occupations (clerical, sales, service), small employers, technical occupations
NS-SEC 6-8 Semi-routine, routine occupations and never worked or long-term unemployed

Further & Higher Education in Cultural Sector

4. Further & Higher Education within the Cultural Sector

Key Findings

- There are around **5,500 students** enrolled in cultural-related further education courses in the WMCA area. Of these, there has been a **high proportion of take-up from typically under-represented groups** in the sector, with a high proportion of students from female and ethnic minority backgrounds.
- There is a **good provision** of cultural-related further education courses across the WMCA area, with concentrations around Coventry, Wolverhampton, Dudley and Eastern Birmingham
- Take-up of cultural-related A Levels is **below the national take-up level** by 20-30%. Coventry has one of the highest take-up levels of cultural subjects, but other areas lag behind.
- There are a range of higher education institutions providing cultural-related courses, with around **8,200 students** enrolled across the WMCA area. The most popular courses are design studies, drama and music, with Birmingham City University being the largest provider of higher education cultural-related courses.
- The popularity of cultural-related courses in the West Midlands has remained relatively consistent over the last decade, but there has been a **drop in accepted applications to West Midlands universities of 20% since 2016** (pre COVID-19 pandemic). There has been varied performance across different cultural courses, with take-up of music, dance, imaginative writing and drama courses growing strongly, but declining applications for crafts, fine art and combinations with creative arts and design courses.

4.1 This section provides an overview of further and higher education insights relating to the cultural sector, to build a better understanding of the future potential of the cultural workforce in the region and to help support strategies for talent development and talent retention in the future.

4.2 Much of the data in this section refers to the West Midlands Combined Authority geography (Birmingham, Coventry, Dudley, Sandwell, Solihull, Walsall and Wolverhampton) as opposed to the 3 LEPs, given much of the data has been made available at this level. Reference has been made to the geography for each data source below.

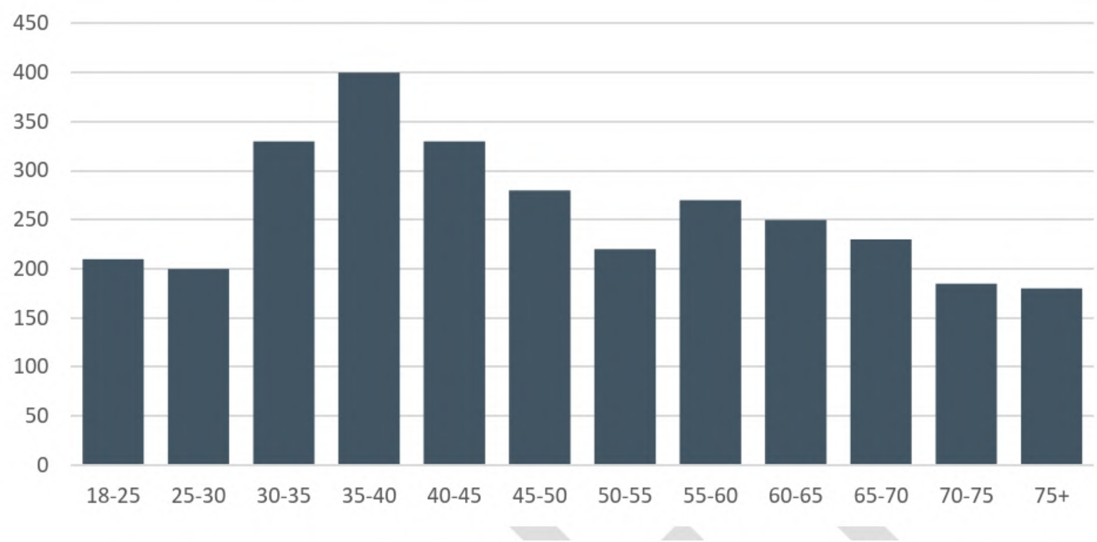
Further Education

4.3 The WMCA area has a large provision of further education courses within the cultural sector. The student enrolment skews heavily female, with **4,447 women** and **1,013 men** enrolled last year.

There is an older age profile of students undertaken cultural courses

4.4 Compared to the typical age profile of students enrolled in further education courses, older students are over-represented in cultural-related subjects compared to FE students in general. Around a quarter of all those enrolled in cultural-related subjects are in their 30s, with a further 19% over the retirement age.

Figure 4.1 Student Enrolment in FE Cultural-Related Courses in the WMCA area, by age

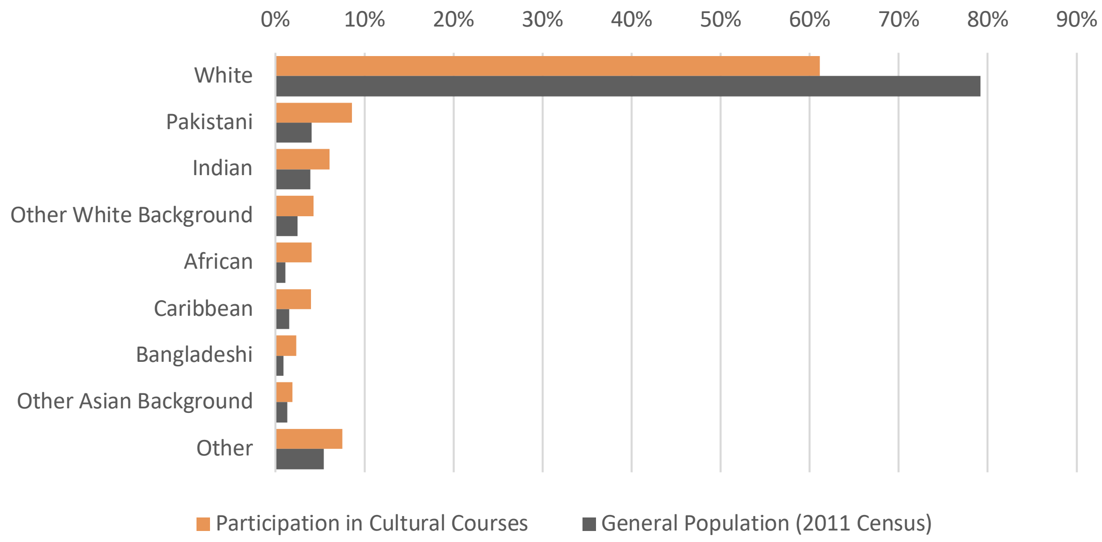


Source: Individualised Learner Record, DfE, 2019

There is a strong representation of students from ethnicities which are typically poorly represented in the cultural sector...

4.5 While it is difficult to gauge ethnic minority representation due to the long interval since the 2011 Census, the ethnic breakdown of students on FE courses in creative subjects appears to be broadly representative of the general population, and if anything, it is over-representative of those backgrounds which are typically under-represented in the sector. 61% of students in cultural-related courses identify as White-British, English, Welsh or Scottish background (with 79% of the whole population being in this category as of the 2011 census). Other prominent ethnicities are British Asian/Asian (those identifying as from a Pakistani heritage account for 9% of all students and Indian heritage as 6%), as well as Other White backgrounds (4%).

Figure 4.2 Student Enrolment in FE Cultural-Related Courses in the WMCA area, by ethnicity



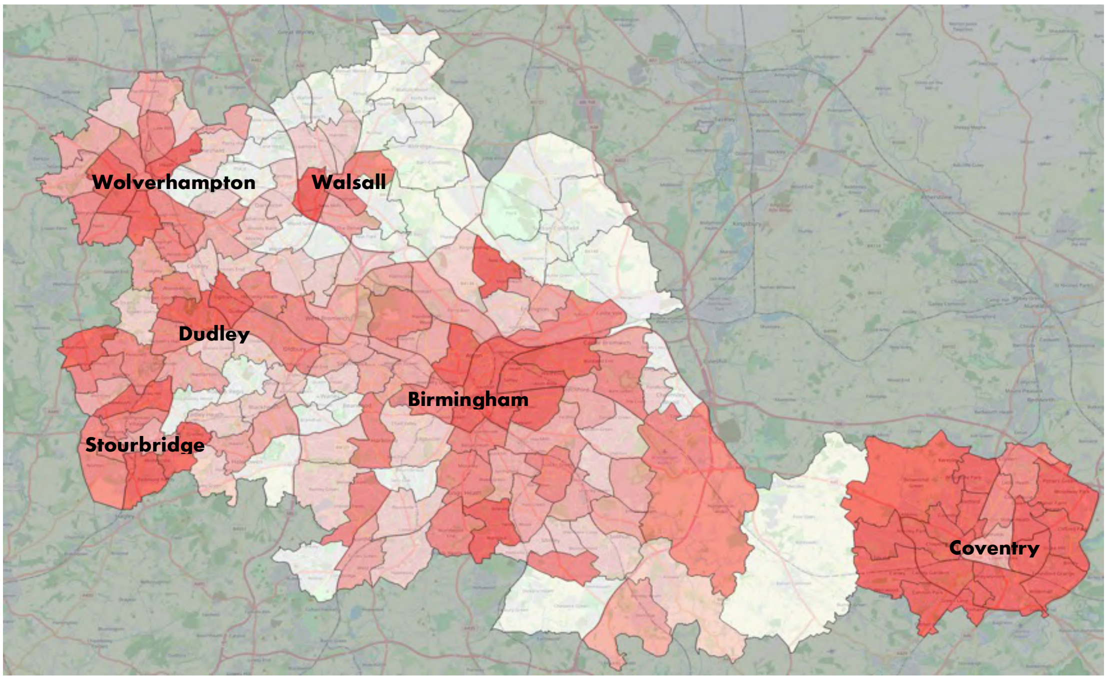
Source: Individualised Learner Record, DfE, 2019

There is good provision of cultural-related courses across the WMCA area, with particular concentrations in urban areas…

4.6 Individualised Learner Records have been examined to identify the location of learners and providers within cultural-related courses in the WMCA area. The depth of colour at each location indicates the number of learners either living in that area (first map) or enrolled in a college in that area (second map.)

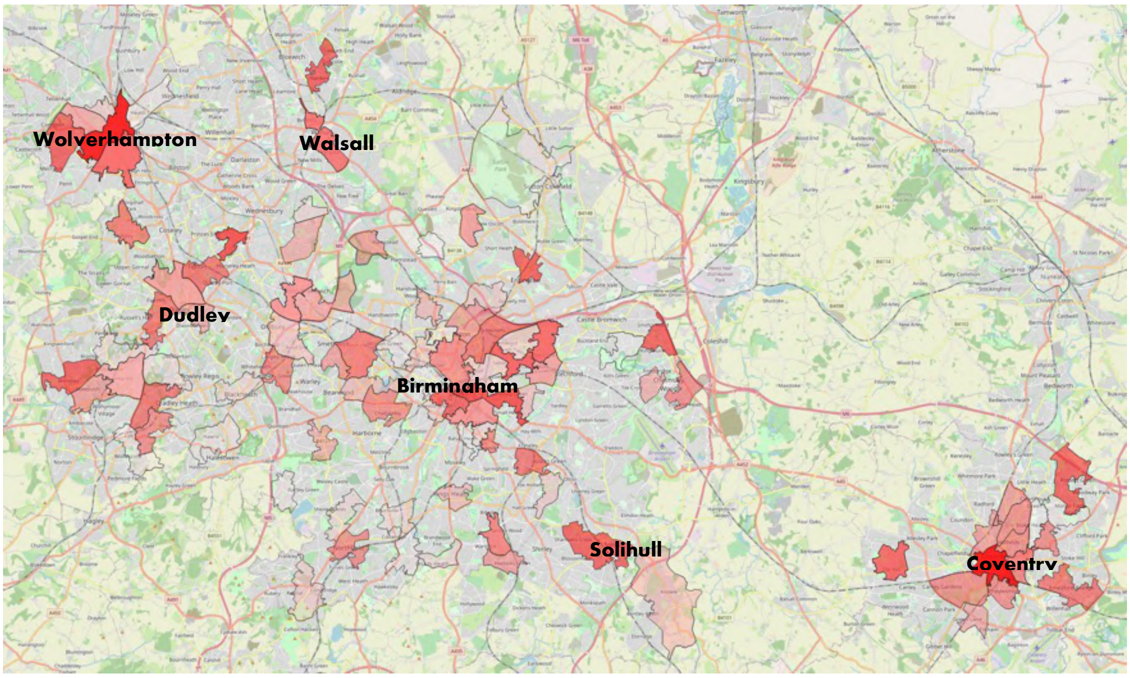
4.7 Provision and enrolment in further education cultural courses correlates strongly with urban areas with a higher enrolment and provision in these places. A number of areas stand out for having a higher take-up of cultural courses, particularly Coventry, Wolverhampton, Dudley and Eastern Birmingham.

Figure 4.3 Location of **Learners** Completing FE Cultural-Related Courses, 2019



Source: Individualised Learner Record, DfE, 2019; Provided by WMCA

Figure 4.4 Location of **Providers** Completing FE Cultural-Related Courses, 2019



Source: Individualised Learner Record, DfE, 2019; Provided by WMCA

A-Level

4.8 Data relating to A-Levels also provides an indication of take-up of cultural courses amongst young people. Across the West Midlands more than 10,000 A-Levels were taken in 2019 in cultural-related subjects, with the most popular being English Language and Literature (5,349 entries), art and design (2,726) and media, film and TV (1,105).

Table 4.1 Enrolment in Cultural-Related Subjects at A-Level, 2019

	Birmingham	Coventry	Dudley	Sandwell	Solihull	Walsall	Warwickshire	Wolverhampton	West Midlands
Art and design	325	179	231	105	114	91	338	139	2,726
Drama	62	61	67	16	34	0	105	8	569
English	948	270	412	220	312	230	644	196	5,349
Media, Film & TV	218	88	105	60	98	43	144	13	1,105
Music	31	5	43	5	17	34	50	0	344
Total	**1,584**	**603**	**858**	**406**	**575**	**398**	**1,281**	**356**	**10,093**

Source: A-Level Statistics, DfE, 2019

4.9 When comparing the uptake of cultural-related subjects to all A-Levels that were completed nationally, trends can be identified which show how popular cultural-related courses are relative to all courses nationally. The table below shows the concentration of enrolment in different subjects, with a score above 1 representing a higher uptake in a subject relative to the national uptake.

4.10 As a whole, the West Midlands has a slightly lower take-up of cultural-related subjects at A Level relative to the national level. Coventry has one of the highest take-ups of cultural-related subjects, with strong uptake of drama and media, film & TV relative to the national level. Other areas with strong uptake include Dudley for Drama and Music, and Sandwell for English and Media, Film & TV.

Table 4.2 Enrolment in Cultural-Related Subjects at A-Level – Performance Relative to the National Uptake, 2019

	Birmingham	Coventry	Dudley	Sandwell	Solihull	Walsall	Warwickshire	Wolverhampton	West Midlands
Art and design	0.5	1.1	0.8	0.8	0.5	0.5	0.8	1.1	0.8
Drama	0.4	1.7	1.1	0.6	0.7	0.0	1.1	0.3	0.7
English	1.0	1.1	1.0	1.1	0.9	0.9	1.0	1.0	1.0
Media, Film & TV	0.8	1.3	0.9	1.2	1.0	0.6	0.9	0.2	0.8
Music	0.4	0.3	1.3	0.3	0.6	1.7	1.0	0.0	0.8

Source: A-Level Statistics, DfE, 2019
Note: A score above 1 indicates that there is a higher uptake of that subject relative to the national uptake. These have been highlighted in orange.

Apprenticeships

4.11 Apprenticeships are gaining increasing popularity across the country, particularly in practical subjects, combining training with on-the-job experience. At present, there is a relatively low number of apprenticeships within cultural subjects (Arts, Media & Publishing), of a total of 17,551 apprenticeships in the WMCA area, only 85 apprenticeships taking place in the WMCA area in 2019 were cultural subjects (0.5%) All of the apprenticeships in the WMCA area for cultural subjects were at Level 3.

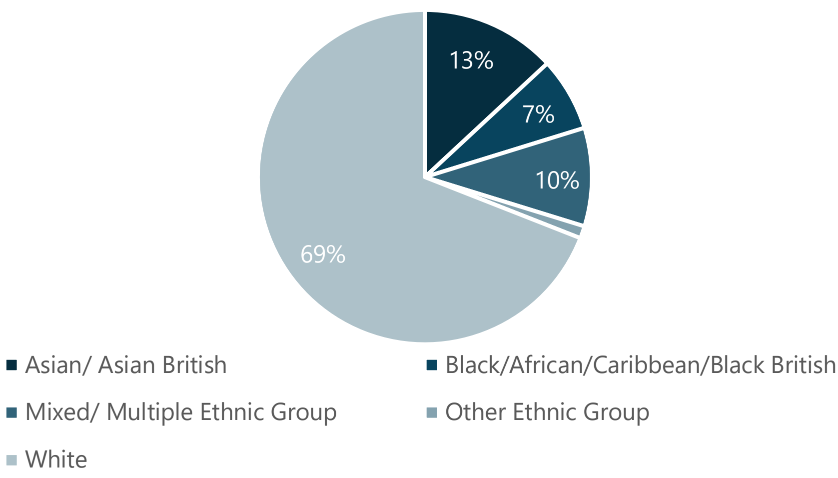
Table 4.3 Providers of Arts, Media & Publishing Apprenticeships in the WMCA Area

Provider		Location of Student	
BCTG	16	Birmingham	28
Affinity People	14	Coventry	20
Birmingham Metropolitan College	11	Wolverhampton	10
SCCU	7	Sandwell	9
The West Midlands Creative Alliance	7	Walsall	9
Access to Music	6	Dudley	5
BC Arch	4	Solihull	4

Source: Individualised Learner Record, DfE, 2019

4.12 Cultural apprenticeships provide a range of opportunities for different people across the WMCA area. For those doing Arts, Media and Publishing apprenticeships 59% of students were male with 41% being female. There is also a strong representation of ethnic backgrounds undertaking Arts, Media and Publishing apprenticeships, with 69% from white backgrounds, 13% from Asian/Asian British backgrounds and 10% from mixed/multiple ethnic groups.

Figure 4.5 Ethnicity of those undertaking Arts, Media & Publishing Apprenticeships in the WMCA Area



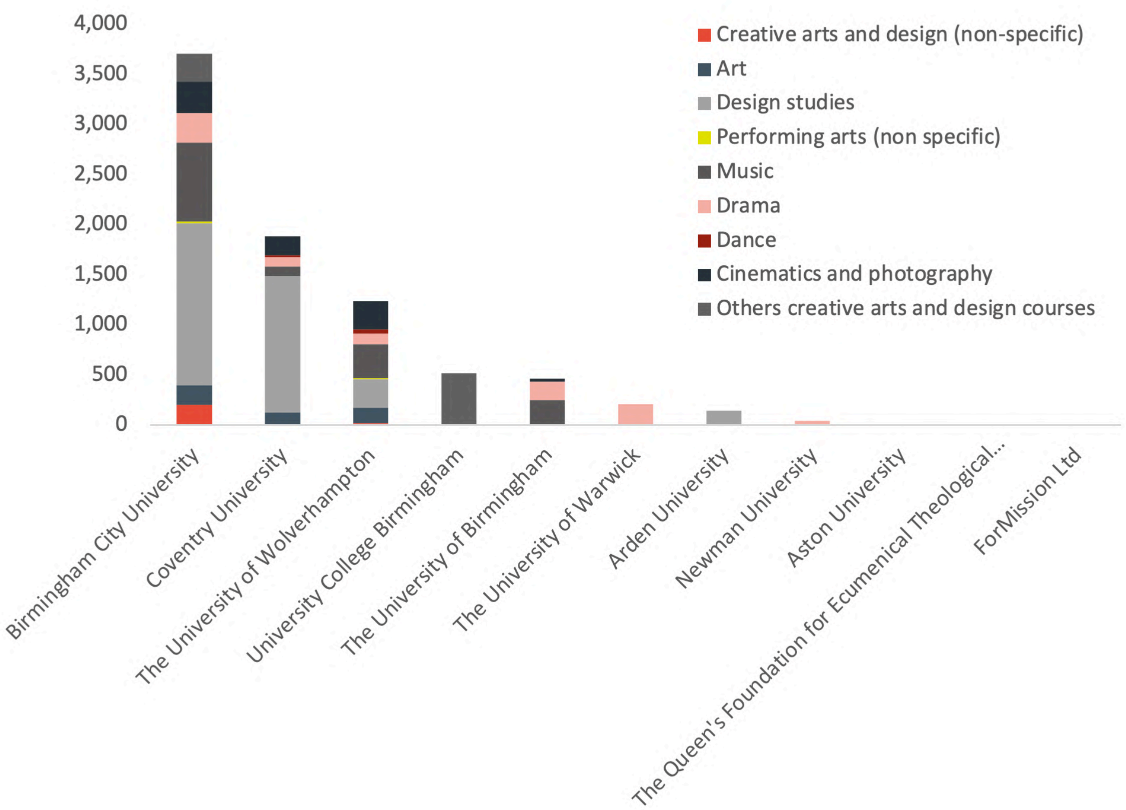
Source: Individualised Learner Record, DfE, 2019

Higher Education

Strong presence of higher education courses undertaken across the WMCA area...

4.13 There are a range of cultural higher educational courses in the WMCA area providing opportunities for people across the area. Data from HESA shows that in 2019 there were 8,200 people enrolled in cultural-related courses across the WMCA area. This accounts for 5% of enrolment in all courses in the WMCA area. The largest institution offering cultural-related courses (based on enrolments) is Birmingham City University, with 3,705 students enrolling in 2019 (45% of students). Other institutions with a strong cultural offer include Coventry University (1,875 enrolments in 2019), the University of Wolverhampton (485) and University College Birmingham (1,235). Design Studies was the most popular Creative Arts & Design course, accounting for 42% of all enrolments, followed by Music (18%) and Drama (11%).

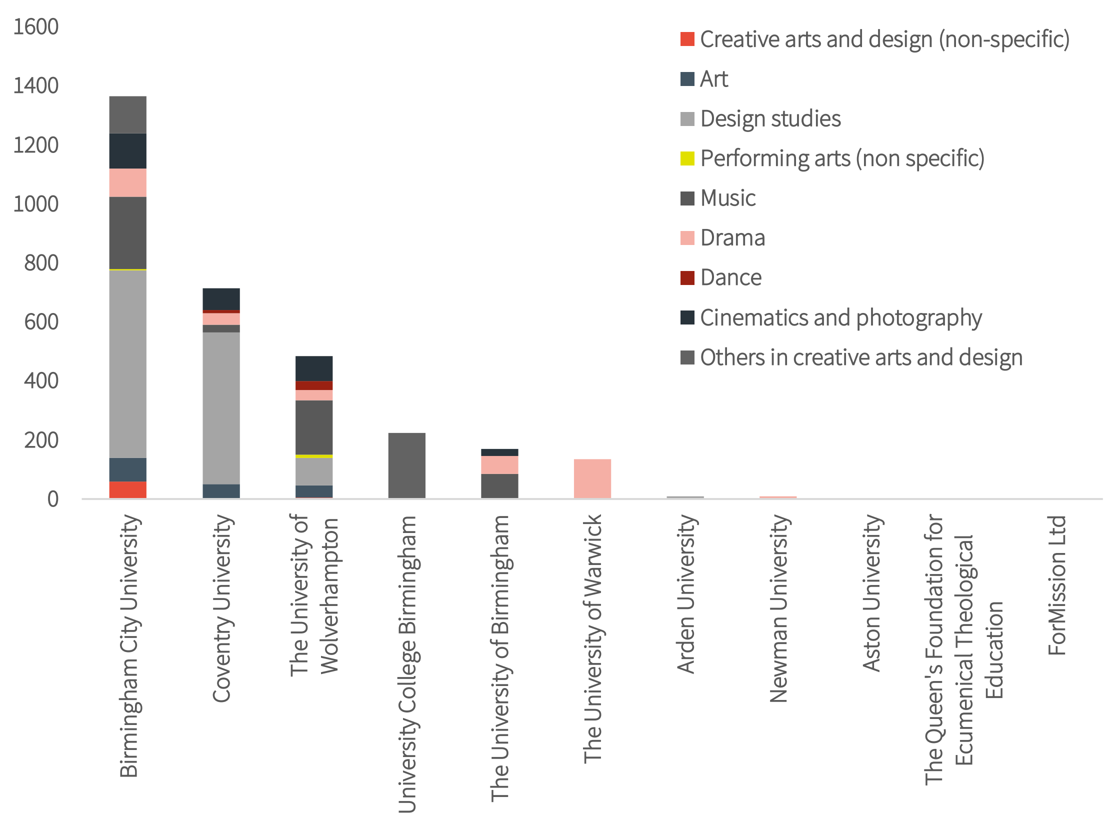
Figure 4.6 HE Student Enrolments in Creative Arts & Design Courses in 2019/20 by University



Source: HESA, 2020

4.14 In 2019/20, 3,115 people qualified from cultural-related courses in the WMCA area. The largest of these were from Birmingham City University (44%), Coventry University (23%) and the University of Wolverhampton (16%). Design Studies courses had the largest number of qualifiers (40%), followed by Music (17%) and Drama (12%).

Figure 4.7 HE Student Qualifiers in Creative Arts & Design Courses in 2019/20 by University



Source: HESA, 2020

4.15 When comparing against other regional geographical areas, the WMCA ranks relatively low in terms of enrolment and qualifiers in Creative Arts & Design Courses in 2019/20.

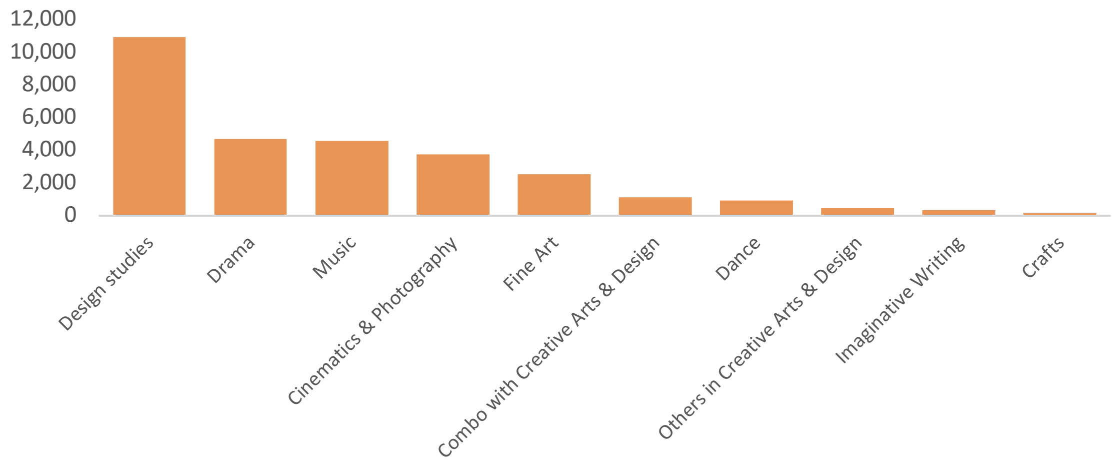
Table 4.4 Enrolment and Qualifiers in Art & Design Courses, geographical comparison, ranked by percentage

	Enrolment			Qualifiers		
	Creative arts and design	All Courses	Percentage	Creative arts and design	All Courses	Percentage
London	50,180	425,810	12%	17,655	154,000	11%
South West	18,685	173,810	11%	5,920	54,900	11%
East Midlands	14,670	185,095	8%	4520	61230	7%
South East	28,135	379,310	7%	8,860	98,755	9%
Yorkshire & the Humber	13,985	198,655	7%	4,500	68,000	7%
North West	16,565	241,440	7%	5,260	80,850	7%
East of England	7,980	143,035	6%	2,790	42,925	6%
West Midlands	**10,865**	**218,295**	**5%**	**4,060**	**71,075**	**6%**
WMCA	8,185	176,670	5%	3,115	58,500	5%
North East	4,490	111,025	4%	1,475	36,655	4%
Total	165,555	2,076,475	8%	55,040	668,390	8%

Source: HESA, 2020

4.16 UCAS data provides an insight to the most applied courses at the West Midlands' universities. The most commonly applied for cultural-related course in the West Midlands is design studies, accounting for 37% of all people applying for courses in 2020. Other popular courses include drama (16%), music (16%) and cinematics & photography (13%).

Figure 4.8 Accepted Applicants for **West Midlands** Culture-Related Courses, 2020



Source: UCAS, 2020
Note: This data tracks university acceptances, and not actual starts.

4.17 When comparing against other regional geographical areas, the West Midland's ranks relatively low in terms of accepted applicants in Creative arts & design courses in 2020. It is also evident that Fine Art Courses are the most popular creative arts and design course across the regions of England.

Table 4.5 Accepted Applicants for Culture-related courses, 2020, geographical comparison, ranked by percentage

	Creative arts and design	All Courses	Percentage	Creative arts & design course with largest proportion of accepted applicants
South West	37,970	558,705	7%	Fine Art (11,660)
South East	57,690	1,031,090	6%	Fine Art (20,710)
East of England	36,390	657,205	6%	Fine Art (12,760)
East Midlands	24,980	485,695	5%	Fine Art (9,550)
Yorkshire & the Humber	28,540	592,660	5%	Design Studies (10,060)
North East	12,610	268,865	5%	Design Studies (5,420)
North West	38,600	855,965	5%	Fine Art (13,440)
West Midlands	29,450	707,605	4%	Fine Art (10,900)
London	52,310	1,407,730	4%	Fine Art (19,670)

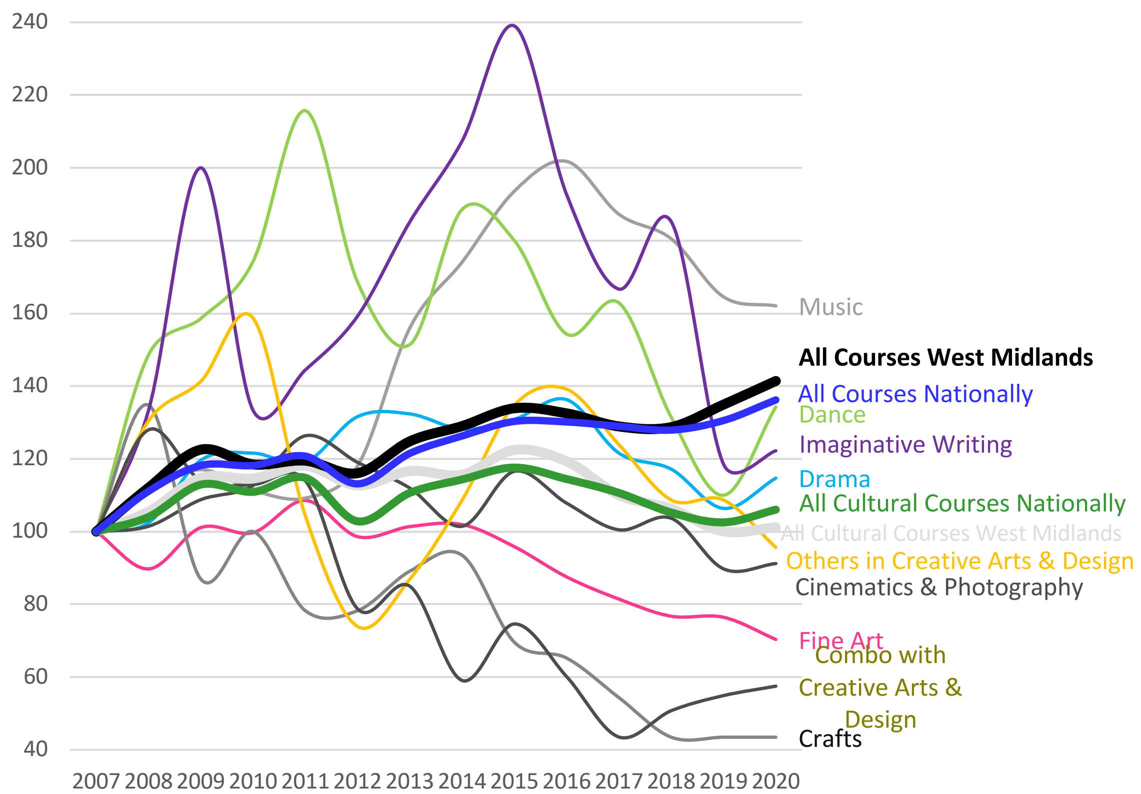
Source: UCAS, 2020

4.18 UCAS data also highlights the popularity of cultural courses over time, showing how applications to these courses have changed over the last decade. Across all cultural courses, the number of applications slowly increased between 2007 and 2015, before falling over the last five years, this is broadly in line with the national trend.

4.19 There has been varied performance across different cultural courses. Over the past decade, music, dance, imaginative writing and drama courses have experienced the strongest growth in applications, experiencing a positive growth in the number of applications since 2007. By comparison, the number of applications for crafts, fine art and combinations with creative arts and design courses has declined since 2007, with the number of applicants for crafts courses declining by nearly 60% over this time period.

4.20 The trend in cultural courses differs to that of all other courses. Where the popularity of cultural courses has declined over the last five years, the trend for acceptance in all university courses has gradually increased. The popularity of culture related courses in the West Midlands was below the national level in 2020, the general acceptance into university was higher than the national average in the same year.

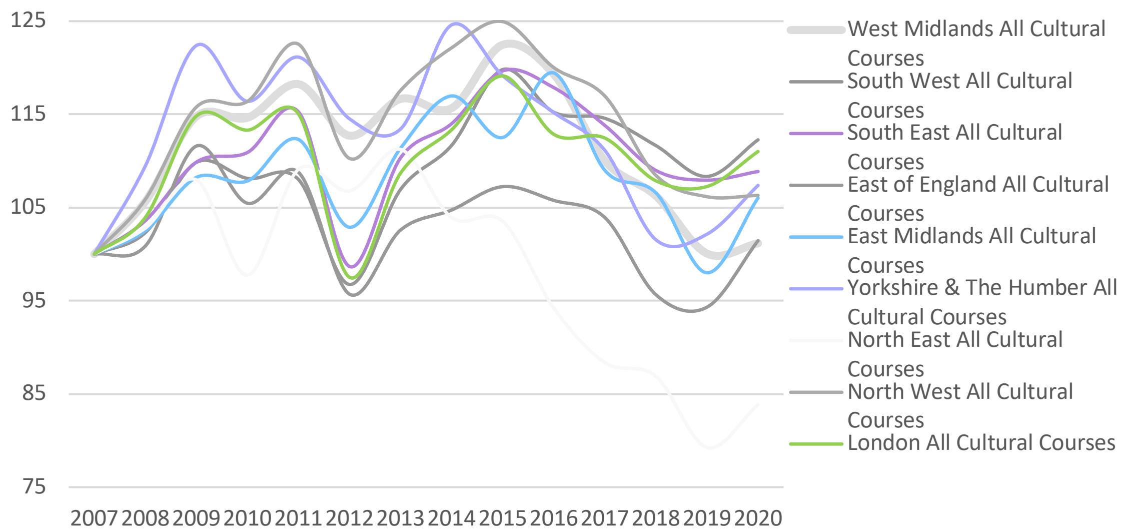
Figure 4.9 Trend in Accepted Applicants for **West Midlands** Culture-Related Courses, 2007-20, Indexed (2007 = 100)



Source: UCAS, 2020
Note: This data tracks university acceptances, and not actual starts.

4.21 When comparing regionally, there has been a decline in accepted applicants for culture-related courses across the board from 2015 to 2019. The West Midland's initially had a larger number of accepted applicants in culture-related courses (from 2007 to 2015), however the fall in accepted applicants has been significant over the last five years.

Figure 4.10 Trend in Accepted Applicants for Culture-Related Courses Regionally, 2007-20, Indexed (2007 = 100)



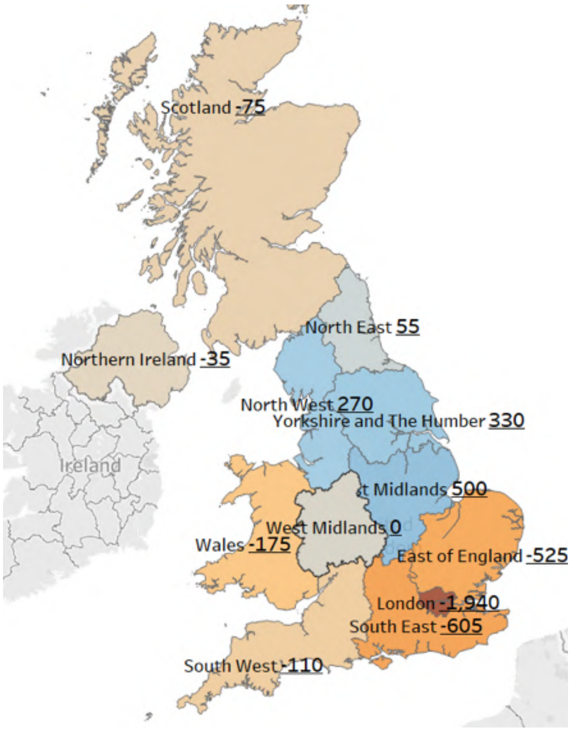
Source: UCAS, 2020
Note: This data tracks university acceptances, and not actual starts.

Graduate Retention

4.22 Data in relation to graduate retention is unavailable down to subject level. Data across all subjects shows there is a net outflow of graduates from the West Midlands to other parts of the country, with a combined (undergraduate & postgraduate) net outflow of 2,460 graduates to London, 870 to the South East and 310 to the South West. The West Midlands does receive a net graduate inflow from a number of other regions, including a net inflow of 490 graduates from the East Midlands and 300 graduates from the North West.

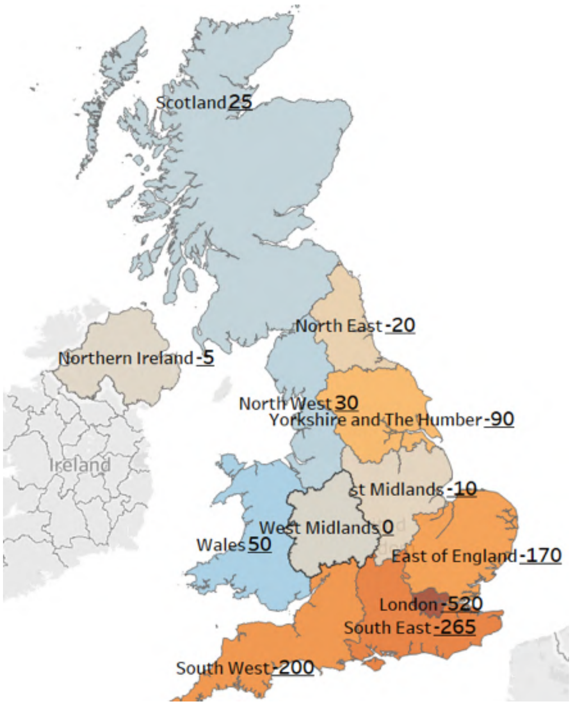
4.23 It is likely that given the strength and pull of London's cultural sector, these trends are reflected within the cultural sector, with a relatively large proportion of cultural graduates moving to London.

Figure 4.11 Net Flows of **Undergraduate** Students from West Midlands Universities



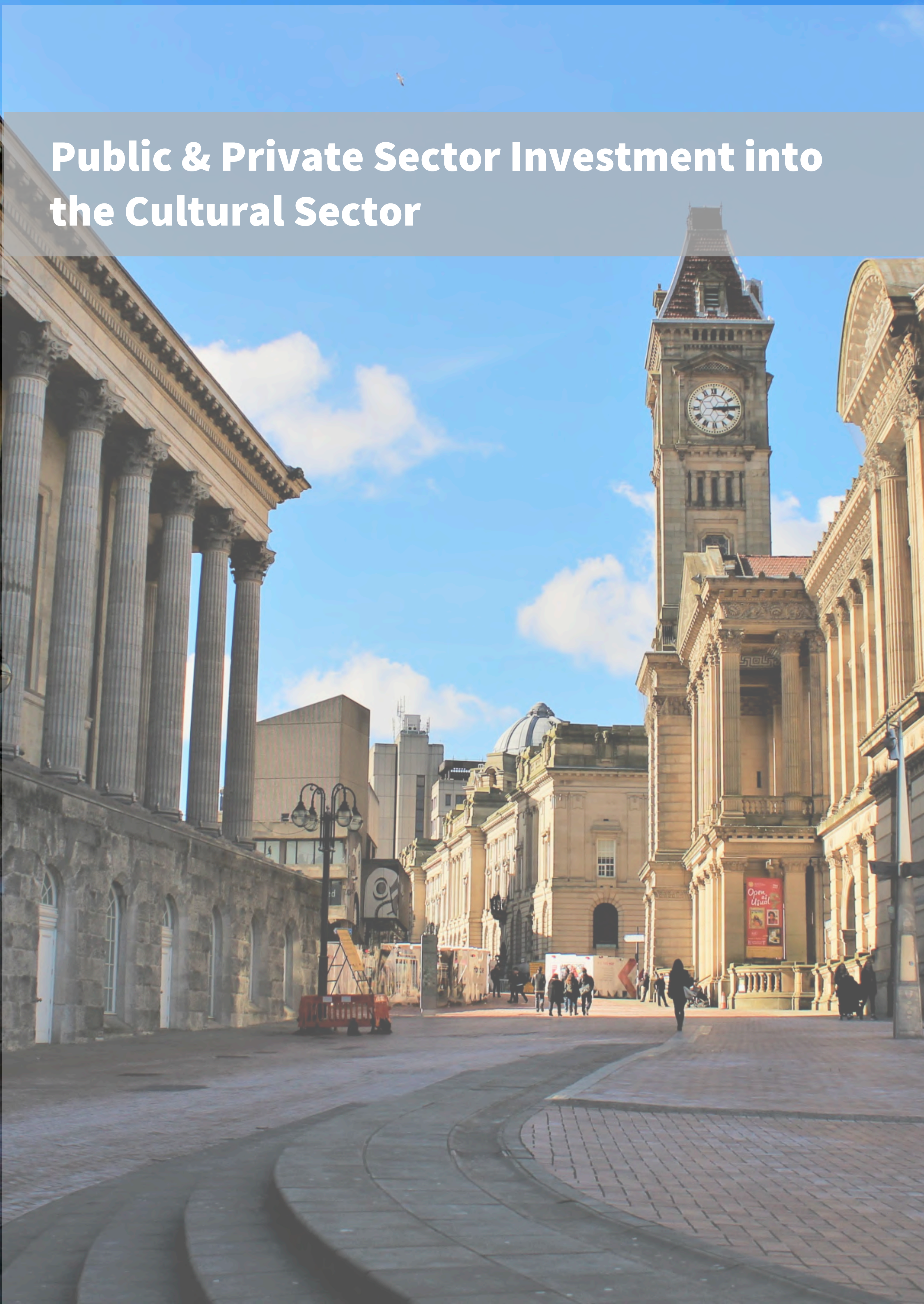
Source: WMCA Analysis of HESA Data, 2018

Figure 4.12 Net Flows of **Postgraduate** Students from West Midlands Universities



Source: WMCA Analysis of HESA Data, 2018

Public & Private Sector Investment into the Cultural Sector



5. Public & Private Sector Investment to the Cultural Sector

Key Findings

- There is a wide range of public and private sector investment into the cultural sector in the WMCA area.

- The WMCA area has received **£388m** of funding from the National Lottery Heritage Fund between 1994 and 2020, with the majority of projects being 'built environment' or 'community, cultures and memories, or intangible heritage' projects. National Lottery Project Grants have invested a combined **£17.1m** in the WMCA area since 2018/19

- The Arts Council National Portfolio programme provides funding to organisations which demonstrate a commitment to artistic excellence and ambition. The WMCA area has received a total of **£291m** in investment over the 2015-18 and 2018-22 funding cycles, with theatre and dance organisations the largest recipients of funding.

- The DCMS Cultural Recovery Fund (administered by Arts Council England, National Lottery Heritage Fund, Historic England and BFI was launched to protect the UK's culture and heritage sectors. Cultural organisations in the WMCA area, received over **£62.1m** worth of capital and grant funding and an additional **£23.4m** of repayable finance. In total, the area received 8% of the national funding pot. The per capita investment for the WMCA area was **£20.39,** slightly higher than the national average of £18.84.

- Local authorities across the WMCA area play an important role in investing in cultural facilities. At least **£82.4m** was invested by local authorities in archives, museums, arts and libraries in 2018-19.

- Local Enterprise Partnership (LEP) Funding has also been a key source of funding for the WMCA area which is part of 3 LEP areas. LEP funding has been particularly instrumental to enabling cultural infrastructure and regeneration projects.

- The EU has been an important source of funding for cultural activity in the WMCA area, BREXIT is likely to have a large impact on cultural organisations and individuals in the area.

- Cultural organisations often operate using a mixed economy funding model, using both public and private funding sources. With public sector funding holding a large opportunity cost, the role of private sector investment in culture is increasingly important. Arts and cultural organisations in the West Midlands received £36m, of which 51% came from Trusts and Foundations, 26% from individual giving and 23% from businesses.

5.1 Cultural sector organisations are funded through a variety of sources including; earned income, public sector grants, private sector investment and donations.

5.2 This section provides a baseline analysis on public and private sector investment into the cultural sector, highlighting some of the key investors into culture in the region. Funding into the sector comes from a range of different sources and funding pots, both well-established, but some are have also very recently emerged (in response to COVID-19).

5.3 Although the analysis provides a good indication of cultural investment, not all investment will have been captured in this analysis as comprehensive data is unavailable for all of these sources. We have used a number of methods to demonstrate the scale of investment and provided benchmarks for the WMCA's position where possible:

- **Public Sector Investment**: analysis of publicly available databases showing where public sector investment has been spent.
- **Private Sector Investment**: using a combination of publicly available information, crowdfunding statistics and Meltwater (a media analysis tool) and 360Giving to identify private sector investment taking place across the WMCA area.

5.4 The key sources of investment into the cultural sector that have been identified are shown in the table below.

Table 5.1 Example of Public & Private Sector Cultural Investment Sources

Public Sector Investment	• Local Authority investment • LEP Funding • Government's place-based funding (Future High Street Fund, Getting Building Fund, Towns Fund, Levelling up Fund) • WMCA Cultural and Creative Enterprises Development Programme • EU Funding • Non-departmental public bodies (National Lottery Heritage Fund, National Lottery Community Fund, Arts Council England) • Department for Education's Music Education Hubs (administered by Arts Council England) • DCMS Cultural Recovery Fund (administered by Arts Council England, National Lottery Heritage Fund, Historic England and BFI)
Private Sector Investment	• Private Investment • Philanthropic Giving • West Midlands Investment Prospectus • Crowdfunding

Public Sector

Local Authority Investment in Culture

5.5 Local authorities play an important role in investing in cultural facilities and events, including providing archives services, museums, arts services and libraries. The latest data, from the Arts Council Dashboard, shows the level of LA investment in the sector (it should be recognised that the data has limitations based on what is made publicly available by individual local authorities).

5.6 More than £82.4m was invested by local authorities' archives, museums, arts and libraries in 2018-19, with the largest investors being Birmingham (£30.8m), Walsall (£8.9m) and Wolverhampton (£7.7m).

5.7 The table below shows the change in funding from Local Authorities over a five-year period, funding has decreased significantly in the majority of the Local Authorities with only Walsall, Rugby, Warwick, East Staffordshire and Wyre Forest experiencing growth in funding. In total over the WMCA area, Local Authority funding has fallen from £111m to £82.4m, which is equivalent to a 26% decrease over the five-year period.

Table 5.2 Local Authority Investment in Archives, Museums, Arts & Libraries, 2018-19

Local Authority	2013-14	2018-19	% change
Dudley	£8.0m	£6.3m	-21%
Sandwell	£9.2m	£5.9m	-36%
Walsall	£8.7m	£8.9m	+2%
Wolverhampton	£15.0m	£7.7m	-49%
Coventry	£10.0m	£6.6m	-34%
North Warwickshire	£13,000	£6,000	-54%
Nuneaton & Bedworth	£1.8m	£1.7m	-6%
Rugby	£0.7m	£0.8m	+14%
Stratford-on-Avon	N/A	N/A	N/A
Warwick	£2.2m	£3m	+41%
Birmingham	£44.3m	£30.8m	-30%
Bromsgrove	£0.4m	£0.3m	-25%
Cannock Chase	£1.0m	£1.0m	0%
East Staffordshire	£1.0m	£1.2m	+20%
Lichfield	£0.7m	£0.3m	-57%
Redditch	£1.4m	£0.8m	-43%
Solihull	£4.9m	£4.8m	-2%
Tamworth	£1.3m	£1.2m	-8%
Wyre Forest	£0.4m	£1.1m	+175%
Total	**£111.0m**	**£82.4m**	**-26%**

Source: Arts Council England Dashboard for Local Government Investment, 2019

LEP Funding

5.8 Traditionally, LEPs have provided funding through the sources such as the Local Growth Fund and recently the Getting Building Fund, which can provide funding to cultural activities. The information below provides some examples of cultural funding which have been provided by LEPs in the WMCA area.

Greater Birmingham and Solihull LEP

5.9 GBSLEP has agreed three Growth Deals with government, creating a £433m Local Growth Fund (LGF) programme - a pipeline of capital investments that will create jobs, improve transport links, upskill our people, create houses and raise the quality of life across the region.

5.10 Operating since 2015, the LGF programme is now in its final year of delivery. As of June 2021, all the £207.9m of LGF grant funding had been approved with over £204.3m spent on project delivery. The £22.49m Growing Places Fund, launched in 2012, has supported the delivery of almost 30 projects and activities, such as feasibility studies, through grant and loan funding support.

5.11 Examples of cultural projects which have received funding from the Local Growth Fund[5] and the Growing Places Fund as of 2021 are provided in the table below.

Table 5.3 GBSLEP Local Growth Fund Funding

Project Name	Project Sponsor	Total Project Cost (£)	Total LGF Grant Allocation (£)
Open House, The Rep	Birmingham Repertory Theatre	2,720,000	1,470,000
Hippodrome Access All Areas (Phase One)	Birmingham Hippodrome	1,017,500	717,500
Junction Works (Grand Union) Phase 1	Grand Union	2,602,000	325,000
Dance Hub	Birmingham Hippodrome	4,706,264	1,160,264
Symphony Hall Extension	Performances Birmingham Ltd	13,669,852	600,000
National Memorial Arboretum	National Memorial Arboretum	8,100,000	500,000
MAC Future Resilience	Midlands Arts Centre	1,126,714	400,000

Source: GBSLEP Local Growth Fund 2021

Black Country LEP

5.12 The Black Country Land and Property Investment Fund (LPIF) is made up of allocations from the £200m West Midlands Combined Authority Land Remediation Fund (LRF), secured from Government as part of the devolution deal. The overall Investment Fund is £150m, with an initial drawdown of £53m which is operational between 2017- 2021.The fund invests in projects which support the re-use of brownfield land and buildings and the delivery of supporting infrastructure to secure new housing, industrial and commercial development. The Investment Fund has three main thematic priorities. Theme A – Population Centres – includes the delivery or enhancement leisure and cultural facilities addressing the local tourist market (A5).

5.13 The Black Country LPIF dashboard for July 2020[6] showed the following projects have been approved for funding and will contribute to the cultural sector:

- **The Black Country Living Museum**: Forging Ahead, £8m provided by BCLEP out of a total project investment of £18.6m which will create 60 new jobs and 5,575sqm of commercial space
- **Resonance Music Institute Cable Plaza**, £7.16m funding provided by BCLEP out of a total project investment on £48.45m. The project will remediate 1ha of land, provide 600 homes and create 138 new jobs. The extensive community programme will provide a platform on which people (young and old) meet, learn, share, enjoy and be inspired by music. This positive environment will be stimulated

[5] https://gbslep.co.uk/upload/files/reports/LGF%20Projects.pdf

[6] https://governance.wmca.org.uk/documents/s4403/072020%20LPIF%20Summary%20Dashboard%20v1.0.pdf

by a programme of short courses, open days and events, some of which will be delivered by students under the supervision of their tutors.

Coventry and Warwickshire LEP

5.14 In 2018, four projects in Coventry and Warwickshire have been awarded over £6m of funding to further encourage culture, tourism and the economy through the Local Growth Fund. These projects will have a significant impact in the area ahead of Coventry being UK City of Culture in 2021 and the Commonwealth Games coming to Birmingham in 2022.

- Completing the Culture Capital will receive £2.4 million as a package of investment in key venues and production spaces – Coventry Cathedral, the Daimler Building Scheme, the Belgrade Theatre, The Box at FarGo Village and Drapers Hall – which are essential for the successful delivery and reputation of the city in hosting the UK City of Culture programme and associated broadcasting in 2021
- Royal Shakespeare Company (RSC) Costume Workshop redevelopment will be given £1 million to restore and redevelop its costume workshop, enabling public access for the first time
- Henley Street in Stratford-upon-Avon has been awarded £0.462 million to create a world-class setting at Shakespeare's Birthplace. There will be a high-quality re-design of the streetscape to create a safe, welcoming social space
- Coventry City of Culture Tourism & Leisure Quarter has been given £2.57 million which is part of a wider programme that will deliver transformative public realm and infrastructure improvements to strategic locations within Coventry city centre. It will specifically enhance the areas around The Wave – Coventry's new waterpark and sports facility which will open in the year the city celebrates being European City of Sport.

5.15 In 2019, CWLEP announced £2m of Local Growth Fund funding towards the £26.4m re-development of Warwick Arts Centre's Warwick 20:20 Project. The project is also receiving £4.2m funding from Arts Council England's Large Capital Grants Fund.

5.16 The capital Project involves the removal of the existing gallery and cinema and replacement with a large ground floor exhibition space/gallery, three high-quality digital auditoria, with 250, 180 and 60 seats, a new restaurant and extended foyers. It includes plans to develop digital exhibitions, install facilities to broadcast live significant cultural and sporting events, and to be a hub for digital research and design, contemporary visual arts, cultural tourism and business training as well as creating networking and conferencing suites.

5.17 The Project will sustain over 30 full-time and potentially 20 part-time jobs, while five apprenticeships will be created. It will also assist up to 35 small businesses through engagement and commercial relationships with Warwick Arts Centre.

Government's Place Based Funding

Future High Street Fund & Towns Fund

5.18 In 2018, the Government launched a £675 million fund for High Streets, aiming to renew and reshape town centres and high streets to drive growth, improve experiences and ensure future sustainability. In December 2020, it was announced that the fund would be increased to £830m to be invested in 72 areas in England. Fifteen areas across England have been awarded a confirmed £255 million from the Future High Streets Fund, from the WMCA area, Tamworth Town Centre received £21,652,555.

5.19 In addition to this, a further 57 areas have received a provisional funding offers totalling up to £576 million. In the WMCA area, these include:

- Leamington Town Spa, Warwick (Warwickshire) – £10,015,121
- Nuneaton Town Centre, Nuneaton and Bedworth – £13,362,736
- Wolverhampton City Centre – £15,760,196
- Walsall – £11,439,967

5.20 In July 2019, the Prime Minister announced the £3.6 billion Towns fund which provided over 100 towns in England with up to £1 million to kick start regeneration projects and give areas a boost. The funding ranges from £500,000 up to £1 million per town. Towns in the WMCA area which were supported to develop Town Deals were: Dudley, East Staffordshire, Nuneaton and Bedworth, Sandwell and Wolverhampton.

Nuneaton Towns Fund

In March 2021, the Chancellor of the Exchequer announced in his budget that Nuneaton town would receive the full £23.2million it bid for from the Towns Fund.

The Town Investment plan for My Town Nuneaton includes twelve ambitious projects, boosting the economy and make real difference to the town. Projects include:

The creation of a new Digital Skulls and Innovation Centre

Creation of a George Eliot Visitor Centre

Remodelling of the George Eliot Gardens to include an amphitheatre for outdoor performances

Restoration and repurposing of Saints community hub to include new training and enterprise space, along with four incubation units and a new community space

Reimaging of the Nuneaton Museum and Art Gallery with a £3.5m glass extension to the museum and plans for the surrounding Riversley Park area

Enabling the creation of new and upgraded outdoor event spaces

Wolverhampton Towns Fund

Wolverhampton Town Investment Plan (TIP) received £25m. The TIP focuses on bringing vibrancy and vitality within the city and town centres through the delivery of an Arts Park next to the Grand Theatre and City Centre Public Realm Phase 2, Bilston Market, Wednesfield Market and a High Street events programme.

Redditch Towns Fund

Redditch has secured £15.6m, the TIP includes plans to redevelop the existing town centre library site, moving the library services into the town hall. A proposed public square would be built on the library site to help drive footfall to and from the Kingfisher Shopping Centre.

Walsall Towns Fund

Walsall has been awarded £21.3m of TIP funding, with a number of cultural projects making up part of the TIP including:

Town Centre Performing Arts Venue: An exciting new 1,000 seat, multi-use entertainment and performance arena within Walsall Town Centre, creating a destination venue.

The Creative Industries Enterprise Centre: Creation of a makerspace, creative incubator and skills development hub. Aimed at small enterprises and local residents.

Active Public Spaces: Developing an inviting, engaging and quality public space which better links the high street to the New Art Gallery and edge of town retail.

Getting Building Fund (GBF)

5.21 In August 2020 the Government provided £900 million available through the new Getting Building Fund (GBF) for investment in local, shovel-ready infrastructure projects to stimulate jobs and support economic recovery across the country. West Midlands Combined Authority (WMCA) has been allocated £66m from the GBF for a wide-ranging package of projects that will deliver a much-needed boost to the local economy. The CWLEP was allocated £8.1m of GBF funding.

5.22 The table below provides details of some of the culture related projects which have been awarded funding in the WMCA area.

Table 5.4 Summary of Projects

Project	Description
Stratford Upon Avon College Culture, Media & Construction Assets	The investment will enable the college to transform the curriculum space in four priority areas – construction, digital, creative and hospitality – for the local area. The projects will lead the way in upskilling the local workforce to enable them to secure sustainable employment and drive economic growth.
North Warwickshire and Nuneaton Arts Challenge Fund	The investment will establish an Arts Challenge Fund to support the northern part of the county by engaging with local artists and experienced place curators to create innovative experiences which stimulate the economic and social wellbeing of the local area
Completing the Cultural Capital	The City of Culture 2021 is set to be one of the biggest years in the history of Coventry – and this package of wide-ranging, exciting measures will help maximise the impact for visitors, local people and the economy as well as leaving an invaluable legacy.
Commonwealth Economic Legacy at Ricoh Arena, Coventry	The investment will establish a world-class conference, exhibition and sporting venue through Commonwealth Games legacy projects, including refurbishments to Ericsson Hall, the main arena hosting the Judo and Wrestling events in the 2022 Commonwealth Games. The project will also establish the Commonwealth Convention Centre and create a new food and beverage offering.

Ancient and Exceptional Unique Visitor Stay Places	The two remaining Medieval city gates and the timber-framed cottages at Priory Row will be fully restored and converted to provide unique accommodation for visitors to the city. These photogenic historic buildings dating from the 14th and 15th centuries are remarkable survivors and will generate income for Historic Coventry Trust allowing ongoing educational and community projects. The project is the catalyst for wider area regeneration working with the Council and Business Improvement District company.
Charterhouse Heritage Visitor Attraction and Venue Development	At the heart of the park, the nationally important heritage site of the Carthusian Monastery of St Anne founded by Richard II in 1385, will be restored and extended to provide a major tourist attraction, significantly enhancing the visitor economy and city image, boosting investment and job creation. A new restaurant of Michelin starred quality and small conference venue will become an exemplar place for business.
St Mary's Guildhall Coventry Transformation	A sustainable visitor experience will be created promoting the heritage asset in the context of City of Culture 2021 and legacy. Strengthening the growth of the tourism sector, through the creation of new jobs, innovation utilising digital technology including Augmented Reality to help interpret heritage boosting the local economy.
Coventry City of Culture Digital Gallery	Building on exemplars in Paris and Tokyo, this project will showcase the city's strengths in 5G and creative technology, reaching 250,000 visitors and boosting the visitor economy by £5m+ annually. Launching in mid-2021, this signals that the UK's innovation and tourism sectors are bouncing back.
Coventry City of Culture FarGo Village Remodel	Home to forty independent, creative SMEs, remodelling and refurbishing larger warehouse spaces will satisfy demand for grow on space for existing businesses and in turn free up space for more creative entrepreneurs and digital start-ups. New units will house studio and small gallery spaces, some of the latest technologies in 3D printing with Coventry University's FabLab, fashion design and manufacturing, woodwork facilities and screen printing, lino cutting and dark room facilities.
Holly Walk Digital Creative Office Space	The investment will fund the renovation of a vacant Warwickshire Country Council to create much needed new employment space for the growing gaming and digital creative sector in Leamington.
North Warwickshire and Nuneaton Arts Challenge Fund	Working with key partners including the Coventry City of Culture Trust, District and Borough Councils, competitive submissions from artists will be sought to drive regeneration of the High Street. This project focuses on revitalising town centres in northern Warwickshire, creating long term improvements. The affected towns will be former mining towns, market towns and one of Warwickshire's largest town centres in Nuneaton. The project will utilise local creatives, supporting the freelancer community, who have been particularly impacted by the pandemic.

Levelling up Fund

5.23 Announced at the Spending Review, the Levelling Up Fund will invest in infrastructure that improves everyday life across the UK. The £4.8 billion fund will support town centre and high street regeneration, local transport projects, and cultural and heritage assets and is available until 2024-25.

5.24 The fund is split into 3 priority categories for the 368 towns and cities in the UK. In the West Midlands Combined Authority Area, 7 cities are listed in priority category one.

Table 5.5 Levelling Up Fund, Priority Area

Priority Category	Local Authority Area
1	Birmingham, Dudley, East Staffordshire, Sandwell, Walsall, Wolverhampton, Wyre Forest
2	Bromsgrove, Cannock Chase, Coventry, North Warwickshire, Nuneaton and Bedworth, Redditch, Stratford-on-Avon, Tamworth
3	Lichfield, Rugby, Solihull, Warwick

Source: Levelling up Fund

5.25 The first round of the Fund will focus on three themes: smaller transport projects that make a genuine difference to local areas; town centre and high street regeneration; and support for maintaining and expanding the UK's world-leading portfolio of cultural and heritage assets. These include:

- **Regeneration and town centre investment,** building on the Towns Fund framework to upgrade eyesore buildings and dated infrastructure, acquire and regenerate brownfield sites, invest in secure community infrastructure and crime reduction, and bring public services and safe community spaces into town and city centres.
- **Cultural investment** maintaining, regenerating, or creatively repurposing museums, galleries, visitor attractions (and associated green spaces) and heritage assets as well as creating new community-owned spaces to support the arts and serve as cultural spaces

WMCA's Cultural and Creative Social Enterprise Development Programme

5.26 The Cultural and Creative Social Enterprises project has a strong focus on tackling inequalities within the cultural sector, particularly around diverse leadership and helping enterprises that work on a small, local level.

5.27 The pilot programme of the project is taking place in the GBS and Black Country LEP areas, and was developed with the input from the WMCA Cultural Leadership Board (CLB) to test new approaches on helping the cultural and creative sectors which have been affected by the COVID-19 pandemic and national lockdowns.

5.28 Small social enterprises within the cultural and creative sector, with a turnover of less than £250,000, could apply for two grants of £30,000 to help develop their own business model and provide support for five other micro-sized enterprises. No match funding is required by the applicants and activities must be delivered between April and November 2021.

5.29 Successful applicants are provided with access to tailor-made training and mentoring provision to help them grow. The programme is a pilot, with the learning from evaluation to guide further support cultural and creative social enterprises.

EU Funding

5.30 The EU has been a valuable source of funding for cultural activity in the UK[7]. Cultural organisations in England have had access to a range of European funds for projects and programmes. The main source has been the European Structural and Investment Funds (ESiF) – the EU's main funding programme for supporting growth and jobs across EU member states. This includes the European Regional Development Fund (ERDF), European Social Fund (ESF) and part of the European Agricultural Fund for Rural Development (EAFRD). There have also been other sources such as Creative Europe (2014-16) – the programme aimed to support the cultural, creative and audio-visual sectors in Europe until 2020.

5.31 The EU concluded a Trade and Cooperation Agreement (TCA) on the terms of their future relationship in December 2020. The agreement did not include the UK's participation in Creative Europe 2021-27. UK applicants will still be eligible for some funding from the cultural sub-sector programmes e.g. i-Portunas artist mobility calls and Perform Europe.[8]

5.32 Going forward, EU funding will be replaced by the Shared Prosperity Fund, which is due to be launched in 2022 and is expected to offer £1.5 billion per annum. In the meantime, The Community Renewal Fund has recently been launched, which provides funding for "innovative pilots and projects that address community needs and support local places."[9] This includes culture-led regeneration projects.

Non-departmental Public Bodies

5.33 The National Lottery provides funding to projects in arts, sport, heritage, charity, voluntary, health, education and environmental sectors. The grant funding is dispersed through a number of distributors throughout the UK.

National Lottery Heritage Fund

5.34 The National Lottery Heritage Fund is one of the 12 distributors of funding from the purchase of National Lottery Tickets. Since 1994, the National Lottery has raised more than £39 billion for good causes with over £8bn distributed to more than 44,000 heritage projects across the UK[10].

5.35 In the WMCA area a total of 2,081 projects have received £300m from 1994 to 2020, with 10 projects receiving 21% of that funding (£82.2m). The largest grant awarded in the WMCA area was for the Birmingham Town Hall renovation in 2000/01 for £13.5m. The majority of grants were allocated to projects with the main heritage area of "community, cultures and memories and intangible heritage" where 1,676 projects received £30.5m and the majority of funding was received by "built environment" projects, where 509 projects received £162.7m of funding. By their nature, built environment projects (capital

[7] Arts and culture sector and exit from the European Union, November 2016, Arts Council

[8] https://www.creativeeuropeuk.eu/news/update-creative-europe-and-outcome-eu-referendum

[9] UK Community Renewal Fund: prospectus 2021-22 - GOV.UK (www.gov.uk)

[10] https://www.heritagefund.org.uk/about/what-we-do

projects) will tend to be higher awards than community, culture and moments or intangible heritage awards.

5.36 The table below shows the number of projects and grant funding awarded by grant band, with the majority of projects requiring under £10,000 funding.

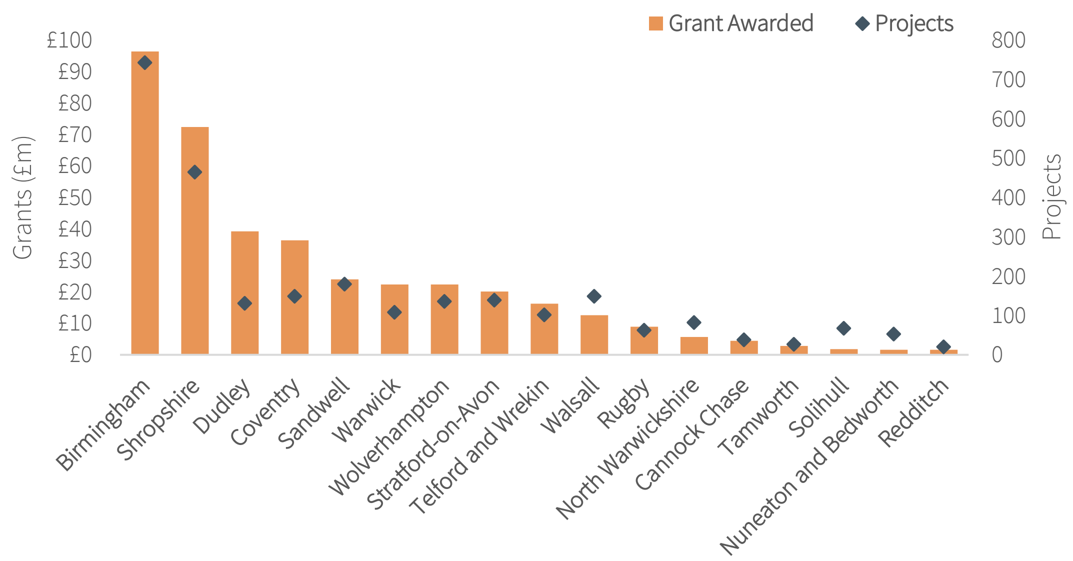
Table 5.6 NLHF Awards by grant band

Grant Bands	Projects awarded	Grant awarded
Under £10k	1,282	£6,458,500
£10k to £100k	995	£42,136,724
£100k to £250k	141	£23,413,203
Over £250k	229	£287,958,901
Total	**2,647**	**£387,958,901**

Source: National Lottery Heritage Fund, 2021 Note: Total figure includes Shropshire and Telford & Wrekin

5.37 The graph below shows the amount of funding received by Local Authority in the WMCA area and the number of projects which were funded. Birmingham received the most amount of grant funding (£96.3m) and had the highest number of projects (742) taking place in the WMCA area, Redditch on the other hand received the smallest amount of funding (£1.5m) and had the least projects taking place (20). Whilst in real terms, Birmingham has received more investment, it also has a larger population and so the per capita investment figures would show a more proportionate distribution of funding between each of the Local Authorities.

Figure 5.1 Heritage Grants Awarded in the WMCA Area, 1994-2020



Source: National Lottery Heritage Fund, 2021

5.38 The Heritage Fund plans to distribute at least a further £1.2bn of National Lottery income over 2019-2024. There are currently three active programmes for funding:

- National Lottery Grants for Heritage, which offers grants of £3,000 to £10,000 and £10,000 to £100,000 for resilience and inclusion project funding to support organisations working with heritage to adapt and respond to the changing environment they are now operating in.

- Heritage Recovery and Resilience Loans, which offers loans of £50,000 to £250,000, funding activities and costs that help develop or restart an organisation's income generating potential
- Funding for organisation in Wales, capital grants of £10,000 to £250,000 based around two themes – Local Places for Nature and Community Woodlands

National Lottery Community Fund

5.39 The National Lottery Community Fund aims to support local communities, individuals and organisations in making a difference, to bring communities closer together.

5.40 Each year it awards around 12,000 grants to the value of about £600 million, with reach to every local area across the country with 90% of grants for £10,000 or less and at least 80% of funding directly going to charities and community organisations.

5.41 In 2019/2020 the National Lottery Community Fund provided funding to over 8,189 projects that bring communities together. This included 523 projects in the WMCA area which received £17.1m funding, some of which supports cultural activities.

Arts Council England

5.42 Set up in 1946 to champion and develop arts and culture across the country, Arts Council England receives funding from the DCMS and National Lottery which it distributes through a number of programmes to organisations, individuals and communities. This includes:

- **Project Grants:** ACE Grants for the Arts which was superseded by the Arts Council National Lottery Project Grants
- **Regular Funding:** Museum's funding (2015-18), National Portfolio Organisations and Sector Support Organisations (NPO's and NPO SSO) and Music Education Hubs (MEH).
- **Strategic funding** which includes but is not limited to: Large and Small Capital Grants fund, Developing Your Creative Practice, Elevate, City of Culture DCMS, Creative Local Growth Fund, Birmingham Commonwealth Games Cultural Programme, ACE Emergency Response Fund, Strategic Touring, Subject Specialist Network, Museum Resilience Fund.

Table 5.7 All funding to the WMCA awarded through ACE from 2018/19 to 2021/22

Funding Stream	2018/19 (£)	2019/20 (£)	2020/21 (£)	2021/22 (£)	Total (£)
Project Grants	5,109,287	5,028,562	5,564,718	1,476,831	31,281,708
Regular Funding	48,613,209	49,466,482	54,436,085	42,878,182	331,119,572
Strategic Funding	6,804,001	15,254,311	26,278,782	666,049	76,486,795
DCMS Culture Recovery Fund			51,791,761		51,791,761
DCMS Culture Recovery Fund Loans			23,400,000		23,400,000
Total	**60,526,497**	**69,749,355**	**161,471,346**	**45,021,062**	**514,079,836**

Source: Arts Council England, 2021 Note: Award data is as of June 2021

5.43 Some examples of funding provided to the WMCA area through these funding programmes are provided below.

National Lottery Project Grants

5.44 The National Lottery Project Grants, administered by Arts Council England, support individual artists, community and cultural organisations (e.g. libraries and museums), providing grants from £1,000 to £100,000. The 2020/21 round of funding had a budget of £77.9m with a focus on responding to the needs of smaller independent organisations and individual practitioners during Covid-19. This removed the requirement of match funding (of at least 10%) from applicants. Due to the national lockdown, the Arts Council expected that many of the projects seeking funding would be digitally focused. They also ring-fenced a budget of £1.5m until 31st March 2022 specifically to support the grassroots music sector.

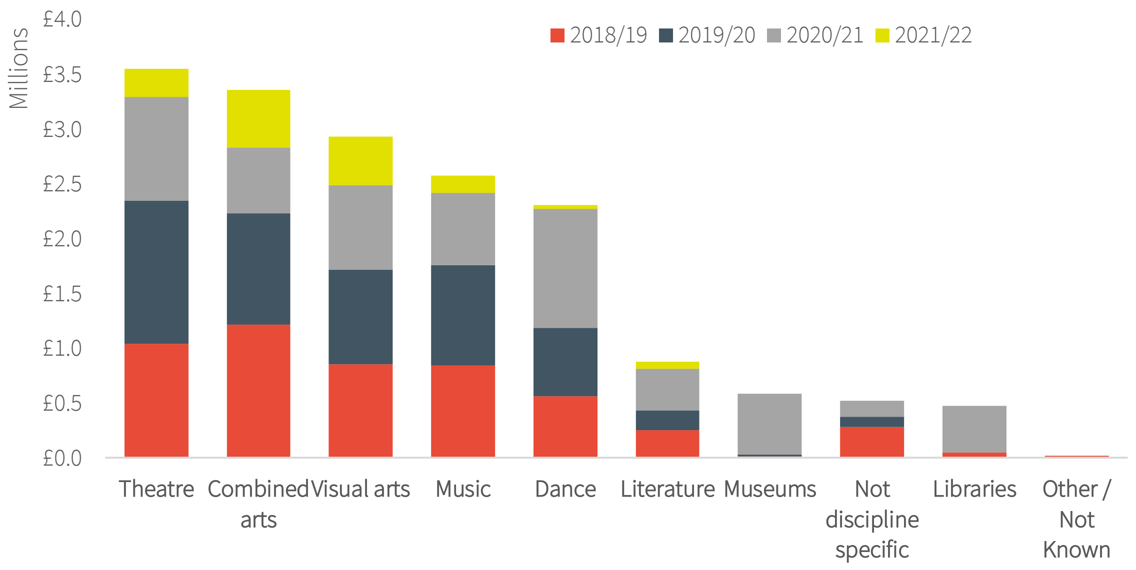
5.45 The table below shows the funding by local authority in the WMCA area, from 2018/19-2020/21 the area has consistently received over £5m funding per annum. **Error! Reference source not found.** shows the funding by discipline, with theatre, combined arts and visual arts receiving the largest proportion of the funding.

Table 5.8 National Lottery Project Grants in WMCA area by Local Authority (£m)

Local Authority	2018/19	2019/20	2020/21	2021/22
Birmingham	£2,600,462	£2,858,255	£2,404,395	£669,665
Coventry	£523,317	£555,491	£2,074,119	£432,001
Warwick	£464,320	£375,403	£224,761	£64,373
Sandwell	£311,002	£413,627	£207,830	£129,208
Stratford-on-Avon	£504,514	£93,249	£81,984	£13,310
Wolverhampton	£233,415	£120,159	£259,407	£42,363
Solihull	£96,887	£86,060	£71,545	£14,999
Walsall	£94,390	£99,014		£20,800
Lichfield	£13,671	£138,119	£49,561	
Dudley	£60,646	£23,992	£75,658	£40,252
Nuneaton and Bedworth	£78,935	£93,095	£25,870	
Rugby	£37,196	£35,113	£59,749	
Tamworth	£15,000	£41,200		£38,500
Bromsgrove	£16,870	£34,992		£11,360
Redditch	£14,845	£30,943		
East Staffordshire	£15,000	£15,000		
North Warwickshire		£14,850	£14,956	
Wyre Forest	£28,817			
Cannock Chase			£14,883	
WMCA	£5,109,287	£5,028,562	£5,564,718	£1,476,831

Source: National Lottery Project Grants, Arts Council England, June 2021

Figure 5.2 Distribution of Arts Council Project Grants Fund in WMCA area by Sector



Source: National Lottery Project Grants, Arts Council England, June 2021

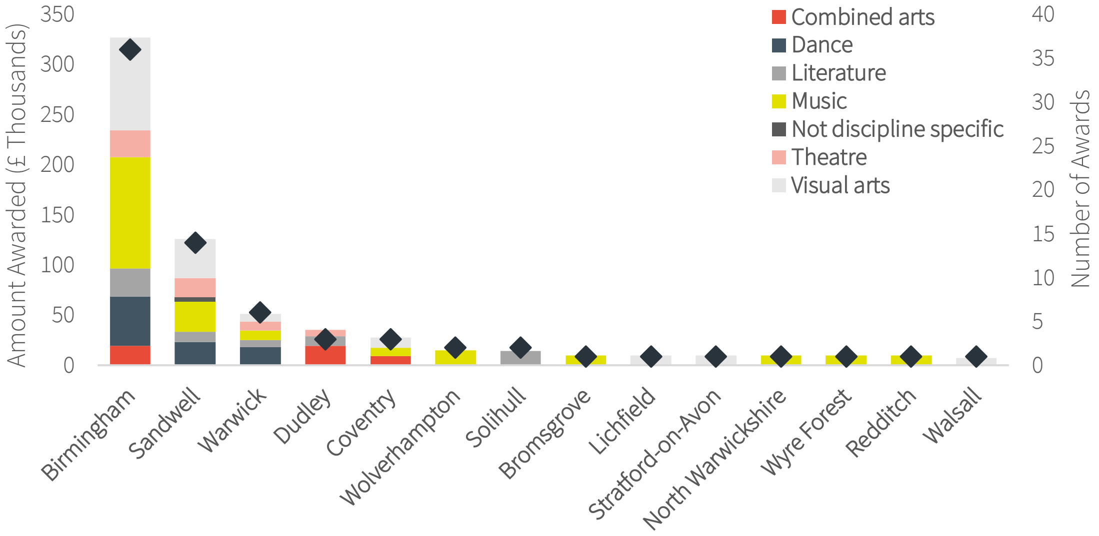
Developing your Creative Practice (DYCP)

5.46 The fund aims to support individuals who are cultural and creative practitioners and want to take time to focus on their creative development; to research, create new work travel, train, develop ideas, network or find mentoring.

5.47 The grant ranges from £2,000 to £10,000 and is aimed at individual artists and/or creative practitioners, with organisations ineligible to apply. The first round of funding was awarded from April to July 2018 and to date £25m worth of funding has been awarded across 9 rounds, with the tenth round taking place in May 2021.

5.48 Round 8 and 9 received nearly 10,000 applications to Round 8 and 9, almost five times the usual and expected number of applications for the two rounds. Round 9 had over 6,000 eligible applications with £11.4 million invested, supporting 1,300 individuals and freelancers to reshape and redefine their work during the pandemic. The WMCA area received £660,670 worth of funding in Round 9 (6%) with 73 awards made (6%), the largest discipline to receive funding in the WMCA area for Round 9 was Music (32%), followed by Visual Arts (27%) and Dance (14%).

Figure 5.3 Round 9 DYCP Funding, WMCA Area by discipline



Source: Arts Council England, 2020

National Portfolio Organisations & Sector Support Organisations (NPO & NPO SSO)

5.49 The Arts Council National Portfolio programme aims to provide funding to organisations which demonstrate a commitment to artistic excellence and ambition. The funding helps organisations nurture talent, promote an artistically led approach to diversity and support international exchange and export. Funding is also made available to Sector Support Organisations (SSO), these are Bridge Organisations, Museum Development Providers, umbrella and networking organisations, strategic library and museum partnership bodies, and other organisations which support the arts and cultural sector as part or all of their function.

5.50 For the funding period of 2015-18, around £1bn was invested in 663 cultural organisations nationally. The WMCA received a total of £119m of funding (11% of funding) between 2015 and 2018.

5.51 For the funding period of 2018-22, museums and libraries were added to the investment portfolio and organisations were provided regular funding for four years. More than £1.6bn was invested in the National Portfolio programme from 2018-22. This included £172m funding (11% of funding) to the WMCA area between 2018 and 2022.

5.52 The table below shows the National Portfolio programme funding received by local authority in the WMCA area in the 2015 to 2018 and the 2018 to 2022 funding rounds. The funding in the latest round has increased by £53m. The latest round of funding also saw Rugby added to the National Portfolio.

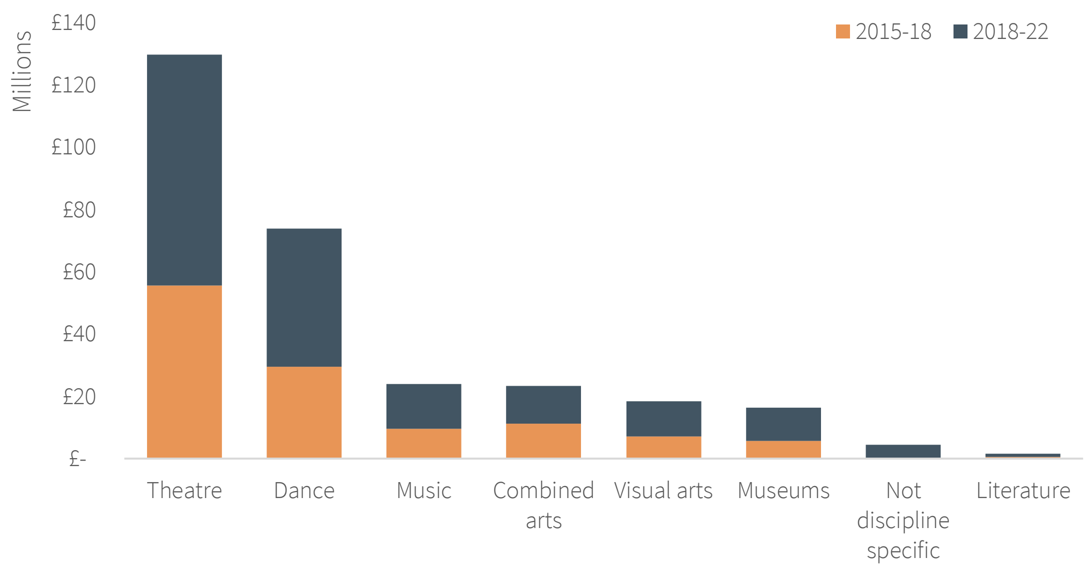
5.53 Figure 5.4 shows the NPO and NPO SSO funding to the WMCA area by discipline. Theatre and Dance organisations were the largest recipients of funding in the WMCA area.

Table 5.9 NPO funding in the WMCA area by Local Authority

Local Authority	2015-18 Funding	2018-22 Funding	Total
Birmingham	£ 59,745,360	£ 89,046,257	£ 148,791,617
Stratford-on-Avon	£ 46,341,000	£ 62,582,562	£ 108,923,562
Coventry	£ 4,504,671	£ 8,382,692	£ 12,887,363
Walsall	£ 2,644,461	£ 3,542,167	£ 6,186,628
Wolverhampton	£ 1,890,810	£ 3,049,706	£ 4,940,516
Warwick	£ 2,658,000	£ 2,210,120	£ 4,868,120
Dudley	£ 383,265	£ 1,839,720	£ 2,222,985
Sandwell	£ 852,927	£ 1,139,827	£ 1,992,754
Rugby	£ 0	£ 251,150	£ 251,150
Total	£ 119,020,494	£ 172,044,201	£ 291,064,695

Source: National Portfolio Organisations Funding, Arts Council England

Figure 5.4 NPO Funding by Discipline, WMCA Area



Source: National Portfolio Organisations Funding, Arts Council England

Creative People and Places

5.54 The Creative People and Places fund aims to engage local residents in choosing, creative and taking part in art experiences in the places where they live. There are 33 independent projects with over 5,000 arts activities and 1,000 local partners. So far, over 3 million people have taken part with 89% of audiences not having 'regularly engaged with arts before'.

5.55 For the 2019-23 round, 17.5 million was awarded to 13 new places, 5 of which are across the Midland's area. This includes the Creative Black Country (Sandwell, Walsall, Wolverhampton), which extended into the Dudley area (with funding of £1.4m for 2019-23). It originally received £2m funding in 2013-18 which was extended by £997,063 for 2018-21.

5.56 The key strands of the Creative Black Country's work are:

- **Creative Communities** – enabling more people to have creative experiences in their community. This includes support from the Voluntary Service Council partners and independent arts advisors to co-design activity that the local community wants to experience. Over twenty groups ranging from young reporters, women's groups, and allotment gardeners have produced events across the region including film screenings, street festivals and community choirs.
- **Landmarks** – enriching the region with creative platforms for local talent to thrive. Working with partners and communities to design and produce large-scale projects that aim to profile creative talent, authentic narratives and core values of the region.

Creative Black Country – Case Study
Wolverhampton venues hosted the first festival of comedy in 2017 called 'Funny Things' attracting new visitors into the city with over 120 events including headline acts and local performers. Funny Things had another successful outing in 2019. The '100 Masters' campaign highlighted contemporary makers, experts and innovators which has received an unprecedented online following reaching over 20 million people worldwide.

The photographic exploration of the Punjab and diaspora communities in the West Midlands through the voices of young girls and women, had launches both in Chandigarh India and the Black Country with partners Multistory.

In 2019, Finding Our Funny Roots - a project that aims to find out what is so unique about Black Country humour funded via National Heritage Lottery Fund.

One of 10 internationals teams to be selected Black Country is collaborating with Wolverhampton University and Wolverhampton City Council to deliver a brand-new youth engagement project that promotes innovation, collaboration and social action. The 'Youth Lab' concept will take a STEAM approach to learning and embedding youthfulness in Wolverhampton's city building strategy.

Arts Council England Large Capital Grants

5.57 The ACE Large Capital Grants fund aims to ensure arts and cultural organisations have the right capital assets to support the delivery of their work. This includes further developing digital infrastructure for the arts sector to support the quality, volume and reach of digital content.

5.58 Over the period 2015–18, the grant prioritised the consolidation and improvement of the existing arts infrastructure, rather than investing in significant expansion or new buildings.

5.59 The scheme does not fund the entirety of the project and requires applicants to secure funding from other sources. The minimum capital grant available is £500,000. Grants of £5 million or more are likely to be exceptional.

5.60 In June 2017, for the fifth round of funding, 11 organisations were invited to make a full application for their required amount upon which ACE would make the decision whether to invest in the project. In the WMCA area, the applicants were:

- **The University of Warwick Combined arts** request for £4,200,000 to transform its 40-year-old building and develop dynamic public spaces, a new accessible gallery and three state-of-the-art digital presentation spaces. It also aims to increased accessibility and environmental sustainability. This funding request was equivalent to 11% of the funding request for the round.

- **Performances Birmingham Limited Music** request for £4,500,000 to expand the Symphony Hall foyer spaces to grow and diversify its audience and create an open and less formal entrance for its visitors. The funding request was equivalent to 12% of the funding request of the round.

Arts Council England Small Capital Grants

5.61 As with the Large Capital Grants fund, the Small Capital Grants fund aims to ensure arts and cultural organisations have the right capital assets to support the delivery of their work. The fund prioritises National Portfolio Organisations and applications for improvements to existing arts and cultural facilities. The fund is also used to improve the digital infrastructure for the arts and cultural sector and support the quality, volume and reach of digital content.

5.62 The 2020/21 round of Small Capital funds was cancelled due to Covid-19 and the emergency measures put in place to respond to the crisis.

5.63 In October 2019, over £12.3m funding was awarded to 46 organisations in the seventh round of small capital grants funding programme. The table below shows the funding to organisations in the WMCA area and the proportion of total funding provided across England for that round

Table 5.10 ACE Small Capital Grants Fund Allocation in the WMCA area Rounds 5, 6 and 7

Applicant name	Area	Art Form	Project Description	Award	Proportion of total funding for that round	Round
Midlands Arts Centre	Birmingham	Combined arts	Birmingham's MAC has been awarded £400,000 to repurpose and create new, accessible artist studios, with a focus on environmental sustainability. The studios will help MAC meet an increasing demand for participation work, allowing them to run more courses and workshops onsite. Equipment which allows for work to be digitally broadcast beyond the venue will also help MAC bring creative experiences to a wider, more diverse audience. Café facilities will also be improved to increase financial resilience.	400,000	23%	7
City of Birmingham Symphony Orchestra	Birmingham	Music	The CBSO will buy an instrument truck, which is vital for transporting high-value instruments, ensuring that more than 120 concerts each year is possible. The new Euro VI-compliant vehicle will ensure that the CBSO will be able to perform to 200,000 audience members each year across the country.	215,000	2%	6
Culture Coventry	Coventry	Visual arts	Coventry's Herbert Art Gallery and Museum will become more energy efficient and environmentally friendly. They will upgrade and improve the building's ventilation systems, light fittings, humidity systems and create new protected storages spaces. This will help reduce the organisation's overheads and reduce the buildings carbon footprint by around 22%.	376,353	3%	6
Ikon Gallery	Birmingham	Visual arts	Ikon will work to future-proof their building, upgrading their infrastructure and equipment, which will improve accessibility, efficiency, innovation and resilience for the central Birmingham gallery.	331,000	3%	6

			This funding will also help them to reduce their carbon footprint and increase their digital capacity.			
Motionhouse	Leamington Spa	Dance	Motionhouse will fully equip their new environmentally- friendly commercial building, creating financial resilience and new studio space.	377,087	4%	5
Wolverhampton Art Gallery	Wolverhampton	Visual arts	The project will allow for improvements to the main reception, will create a digital learning suite and enable Wolverhampton Art Gallery to carry out refurbishments to increase the space for exhibitions and collections interpretation.	431,723	4%	5
Tamworth Borough Council	Tamworth	Not discipline specific	The investment will repair and conserve the Grade II listed Tamworth Assembly Rooms to improve the long term economic and environmental sustainability of the building.	365,000	4%	5

Arts Council England

Department for Education

Music Education Hubs

5.64 Music Education Hubs are groups of organisations (e.g. local authorities, schools, other hubs, art organisations, community or voluntary organisations) that work together to create joined-up music education provision, respond to local need and fulfil the objectives of the Hub as set out in the National Plan for Music Education.

5.65 The funding is provided by the Department for Education and administered through Arts Council England. From 2019-2022, £76.1m worth of funding has been distributed nationally each year. The table below shows the funding provided to Music Education Hubs in the WMCA area. Local Authorities in the WMCA area have received 7.4% (£5.6m) of this funding in each of these years.

Table 5.11 Music Education Hub Funding in the WMCA Area, 2019-22

Local Authority	MEH Covering this area	2019-20	2020-21	2021-22
Birmingham	S4E Ltd	£2,028,418	£2,019,640	£2,003,608
Warwickshire	Warwickshire Music Hub	£747,081	£755,892	£765,139
Sandwell	SIPS Education	£577,288	£572,445	£576,826
Coventry	Coventry Music	£523,840	£524,467	£524,208
Walsall	Forest Arts Music Hub	£475,165	£477,444	£481,418
Dudley	Dudley Music Education Hub	£460,901	£459,951	£457,239
Wolverhampton	Wolverhampton Music Education Hub	£424,075	£434,848	£444,570
Solihull	Solihull Music Hub	£365,136	£361,937	£362,651
Total		£5,601,903	£5,606,623	£5,615,659

Arts Council England 2021

5.66 Each Hub lead organisation receives a proportion of the overall funding amount based on their share of the overall number of eligible pupils in their local authority area(s). 90% of the funding is distributed based on each local authority's share of the total number of pupils registered on roll and the remaining 10% is distributed based on their share of the numbers of pupils eligible for Free School Meals (FSM).

5.67 In recognition of cost pressures facing Hubs the DfE will provide further funding to support Hubs making payments to the teacher pension scheme.

DCMS Culture Recovery Fund

5.68 DCMS's Culture Recovery Fund (CRF) was introduced in July 2020 as part of the Government's £1.57 billion package to protect the UK's culture and heritage sectors from the economic impacts of Covid-19. There were three potions to this funding pot; revenue grants, capital grants and repayable finance loans. The fund was administered by four Arms-Length-Bodies (ALBs) Arts Council England, National Lottery Heritage Fund, Historic England and the British Film Institute. To date, over 5,000 organisations and sites have been awarded funding from the Culture Recovery Fund.

5.69 The Department made £662m (with an additional £258m held for contingency) in revenue grants available through three competitive funding pots administered by its ALBs, each targeted at a different part of the sector. In the first round of funding, ACE's Culture Recovery Fund (grants) allocated £500m worth of funding, Historic England and the NLHF together allocated £88m and the BFI allocated £30m.

5.70 ACE awarded its revenue grants over two consecutive funding rounds, inviting grant applications from £50,000 to £3 million from cultural organisations. It reserved £3.36 million for its Emergency Grassroots Music Venues Fund to support live music venues and invited grant applications from £1,000 to £80,000. HE and the NLHF invited grant applications from £10,000 to £3 million from local or national heritage organisations. The BFI invited grant applications from independent cinemas in England for business sustainability (£30,000 to £200,000) and for safety (up to £10,000).

5.71 The DCMS's primary objective for the CRF's capital grants (£120 million) was to restart key culture and heritage capital projects that had stopped due to the COVID-19 pandemic. The ALBs awarded capital grants through open and closed competitions to various organisations. There were three sub-streams: The Cultural Capital Kickstart Fund (£55 million, administered through ACE), the Heritage Capital Kickstart Fund (£15 million, administered through NLHF) and the Heritage Stimulus Fund (£50 million, administered through HE).

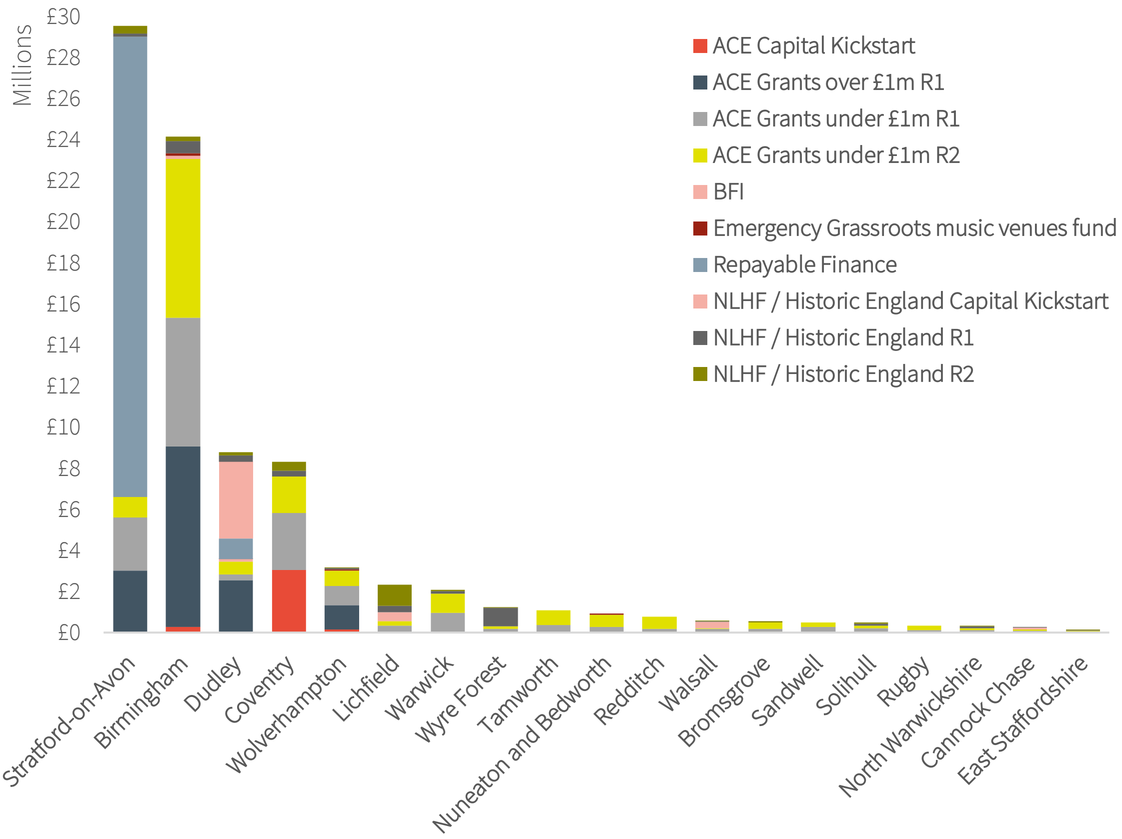
5.72 For the CRF repayable finance programme, applicants could apply for a minimum of £3m with no upper limit, however the maximum available budget for the programme was £270m. The loans were administered through ACE on behalf of the DCMS and the ALBs. Of the 34 organisations offered loans, three organisations were in the WMCA area and received loans worth £23.4m in total; the Royal Shakespeare Company received £19.4m, Shakespeare Birthplace Trust received £3m and Ellis Live received £1m.

5.73 The first round of grants and repayable finance awards were allocated to ensure the immediate survival of 3,800 cultural organisations and heritage sites across the country. In the second round over 2,700 organisations were offered awards of over £390 million across the grants and repayable finance competitions. Another round of funding was announced in December 2020 for £300 million in grants and £100 million in loans to help support organisations transition back to usual operating mode.

5.74 The graph below shows the number of CRF grants awarded in the WMCA area as of April 2021. In total, the WMCA area received 8% of the total funding available, receiving over £62.1m worth of grant funding and an additional £23.4m of repayable finance loans for three organisations.

5.75 Cultural institutes in the WMCA area did not receive any funding for ACE administered capital and revenue grants over £1m in Round 2 but received 17% of the overall grants over £1m in round 1, with awards going to organisations in Birmingham, Stratford-on-Avon, Wolverhampton and Dudley.

Figure 5.5 Cultural Recovery Fund Awards in the WMCA Area by Local Authority



Source: Cultural Recovery Fund, DCMS & Arts Council England

5.76 The table below shows the distribution of funding in the WMCA area by Local Authority. Stratford-on-Avon received the highest total grant funding (£29.5m), however this is due to the large repayable finance loans received by two cultural organisations. Birmingham received the second largest amount of grant funding (£24.1m). When taking into account the various population sizes across the area, Stratford-on-Avon and Dudley received the highest funding per capita. In total, the funding per capita for the WMCA area was slightly higher than that of the national average (£20.39 per capita compared with £18.84 per capita for the national average).

Table 5.12 Cultural Recovery Fund Awards in WMCA by Local Authority (£)

Local Authority	ACE Capital Kickstart (£)	ACE Grants over £1m R1 (£)	ACE Grants under £1m R1 & R2 (£)	BFI (£)	NLHF / Historic England Capital Kickstart (£)	NLHF / Historic England R1 & R2 (£)	Emergency Grassroots Music Venues Fund (£)	Repayable Finance (£)	Total Grant Funding (£)	Total per capita* (£)
Stratford-on-Avon	25,000	3,000,000	3,579,961			536,200		22,400,000	29,541,161	227.07
Dudley		2,559,805	881,501	125,381		464,700	18,476	1,000,000	8,789,863	27.33
Coventry	3,039,200		4,540,669		3,740,000	742,900			8,322,769	22.40
Lichfield			563,055	427,618		1,348,700			2,339,373	22.33
Birmingham	258,177	8,787,448	13,995,889	159,772		788,500	141,965		24,131,751	21.13
Warwick			1,878,538			191,900			2,070,438	14.40
Tamworth			1,086,373			0			1,086,373	14.16
Wyre Forest			289,146			923,000			1,212,146	11.97
Wolverhampton	159,758	1,187,530	1,671,147	7,028		57,400	61,481		3,144,344	11.94
Redditch			759,074			0			759,074	8.90
Nuneaton and Bedworth			862,173			0	64,000		926,173	7.13
Bromsgrove			503,796			55,000			558,796	5.59
North Warwickshire			198,000			135,900			333,900	5.12
Rugby			340,985			0			340,985	3.13
Cannock Chase			152,500	90,783		34,000			277,283	2.75
Solihull			349,740			137,700			487,440	2.25
Walsall			221,900	300,000		56,600			578,500	2.03
Sandwell			489,003			0			489,003	1.49
East Staffordshire			72,555			87,800			160,355	1.34
Grand Total	3,482,135	15,534,783	32,436,005	1,110,582	3,740,000	5,560,300	285,922	23,400,000	85,549,727	20.39
Total Funding for England	**58.8m**	**97.4m**	**590m**	**21.1m**	**15.0m**	**110.7m**	**6.5m**	**270.0m**	**1,060.2m**	**18.84**

Source: Cultural Recovery Fund, DCMS & Arts Council England *Population as of ONS Mid-Year Population Estimates 2019

Private Sector Investment

5.77 Cultural organisations often operate using a mixed economy model, using both public and private funding sources. With public sector funding holding a large opportunity cost, the role of private sector investment in culture is increasingly important. Data relating to private sector investment is patchy, and so a range of different data sources have been used to highlight the types of private sector investment available, and the scale of this investment (where this information is available).

5.78 In 2019, Arts Council England commissioned a survey on private investment in culture[11], the first since the 2011/12 survey by Arts & Business.

5.79 The ACE survey had 887 responses from arts and culture organisations across England. It reported a total of £545m worth of private investment in arts and culture in 2017/18, with 91% of arts and culture organisations receiving some form of private investment in 2017/18. This value has increased by 8% between 2015/16 and 2017/18. However, in the last year of that period there has been limited growth, which is in line with trends across the wider charitable sector.

5.80 The survey also found that individual giving is the largest form of private sector investment, accounting for 43% of private investment in arts and culture in 2017/18 compared to 38% from grants from trusts and foundations.

5.81 Visual arts organisations received the largest proportion of private investment (27% of total investment), followed by museums (23%) and music organisations (18%). Literature and Dance received the least amount of private investment with 2% and 3% respectively.

5.82 The Midlands as a whole received 6% of the total private investment in 2017/18, accounting for 12% of total income for the sector. Arts and cultural organisations in the Midlands received £36m, of which 51% came from Trusts and Foundations, 26% from individual giving and 23% from businesses.

5.83 Analysis of private sector investment has also been undertaken using Meltwater analysis. This identifies some of the largest private sector investments into the WMCA area, based on analysis of press releases online. Whilst this is not a comprehensive list of recent investment, it provides an indication of current private sector investment into the cultural sector.

Table 5.13 Private Sector Funding into the WMCA area

Organisation(s)	City/Area	Funding Amount	Description
Theatres Trust	UK wide	The trust has provided £950,000 to theatres through 159 grants via the Theatres Production fund since 2012. This included £325k in 2020 alone.	Providing grants to theatres in need and at risk. Current schemes include; theatre reopening fund, theatre improvement scheme, theatres at risk capacity building programme, accessible theatres scheme.
Cole Waterhouse	Digbeth, Birmingham	£260 million	Developing a 3.5-acre site as a new cultural, commercial and residential destination with areas of public space.

[11]Private Investment in Culture Survey, 2019, Arts Council

Argent Group, Birmingham City Council and Hermes Real Estate	Paradise Project, Chamberlain Square, Birmingham	£700 million, with £500m from Birmingham City Council and BT Pension Scheme, £61m from Greater Birmingham and Solihull LEP	Office led scheme with additional retail, hotel and leisure space. 3 new public squares for events and activities.
The Wellcome Trust	Birmingham	£1.4m	Investment for an interactive children's gallery at the Thinktank Birmingham Museum
Belmont Works	Digbeth, Birmingham	£60m	Managed by Birmingham City University the regeneration of the old Belmont Works factory site will be used as a hub for small businesses, arts organisations and academics. It will provide free facilities including 3D printers, laser-cutting machines and virtual reality technology, The 145,300 sq. ft site will also be home to BCU's School of Computing, The full Belmont Works development is expected to provide 10,000 new jobs for the wider West Midlands and is expected to be complete in 2021.

Source: Hatch analysis of Meltwater data, 2021

WMCA Investment Prospectus

5.84 The WMCA has recently launched an Investment Prospectus which showcases 24 of the many transformational schemes currently underway in the West Midlands in order to continue to encourage foreign investment into the area. As well as promoting the improved infrastructure and connectivity in the area from the likes of HS2 and being the UK's first 5G testing hub, it showcases large cultural events and innovative creativity as reasons to invest in the area, citing success in hosting City of Culture 2021 and the Commonwealth Games in 2022. Projects for investment include:

Table 5.14 Culture related projects in the WMCA Investment Prospectus

Project	Gross Development Value (GDV)	Description
Dudley Town Centre, Dudley Council, WMCA, Homes England	£110m	• Phased programme of development in residential, employment, retail, leisure, visitor economy and urban environment • Improvement of heritage assets and underutilised opportunity sites and buildings across the town centre
Perry Barr Regeneration, Commonwealth Games 2022 and Legacy, Birmingham City Council, WMCA	£180m for Phase One	• The development of the Athletes' Village together with significant investment in sustainable transport and placemaking will act as a catalyst for significant housing growth in Perry Barr • Phase one of a wider programme to deliver more than 5,000 new homes and drive

		opportunities for schemes to enhance the local centre.
Transforming Nuneaton, Warwickshire County council, Nuneaton & Bedworth Borough Council	£100m+	• Anchored by Warwickshire County Council's new library and business centre, this opportunity is to develop several key sites, bringing new mixed uses to the town centre
Creative Quarter, Royal Leamington Spa, Complex Development Projects and Warwick District Council	£50m+	• Masterplan to regenerate the Old Town of Leamington Spa as a new Creative Quarter • Focus on gaming industry and other new creative offices and mixed-use schemes
Walsall Town Centre, Walsall Council	£300m+	• range of investment opportunities including development partners, forward funding and occupiers in new office, retail, leisure, residential and mixed-use town centre developments • It will build on the significant investment in the Waterfront scheme and New Art Gallery

Source: West Midlands Investment Prospectus

Philanthropic Giving

5.85 Philanthropy is a large source of funding for the cultural sector in the UK. The following organisations are some of the largest independent grant-making foundations supporting cultural organisations in the WMCA area. These include but are not limited to:

- **John Ellerman Foundation** – aims to support charities that "make a difference to people, society and the natural world". There are three core areas of funding; arts, environment and social action. Arts funding is concentrated on; creators in performing arts and curators in museums and galleries outside of London
- **Esmee Fairbairn –** aims to "improve the natural world, secure a fairer future and strengthen the bonds in communities in the UK". This includes grants and social investments in cultural activities across the UK
- **Paul Hamlyn Foundation –** the foundation's vision is for a "just society in which everyone, especially young people, can realise their full potential and enjoy fulfilling and creative lives". It supports six main funding programmes which include; nurturing ideas and people, arts, access and participation, education and learning through the arts, investing in young people and migration and integration.
- **The Wolfson Foundation –** an independent grant-making charity whose fundamental aim is to "improve civic health and society mainly through education and research". The majority of funding grants are for capital infrastructure and equipment with a small number of education and research grants for individuals.
- **Andrew Lloyd Webber Foundation –** the foundation's principal objective is to promote the arts, culture and heritage for public benefit.

5.86 The table below shows the funding provided to the WMCA area from 2019 to 2021 as published on the foundation's website and on 360Giving, an initiative that aims to help UK funders publish their data in an open and standard format online. It is notable from the table that a large proportion of the funding over the last two years has been towards responding to the impact of the COVID-19 pandemic on cultural organisations.

Table 5.15 Philanthropic giving in the WMCA area, 2019-2021

Funding Provider	Organisation	Funding Amount (£)	Description	City/ Area	Year
John Ellerman Foundation	City of Birmingham Symphony Orchestra	150,000	Towards the costs of 40 new commissions by emerging and established composers, to mark CBSO's centenary	Birmingham	2019
Esmee Faibairn	BOM (Birmingham Open Media) CIC	179,088	Towards a programme of artistic development for autistic people aged 25 years plus, enabling people to develop work to a professional standard and pursue careers in the arts.	Birmingham	2019
Esmee Faibairn	African Cultural Exchange Ltd (ACE dance and music)	120,000	Towards a programme of dance outreach to give young people from disadvantaged areas positive experiences from participating in arts, nurture their progress, and work with the wider community	Birmingham	2019
Esmee Faibairn	Women & Theatre (Birmingham) Ltd	159,517	Towards Project costs to support the creative development and delivery of a theatre production with care leavers.	Birmingham	2020
Esmee Faibairn	Theatre Absolute	155,000	Towards Theatre Absolute's core costs, ensuring it can further develop activities and partnerships, make a substantial contribution to the Coventry City of Culture 2021 programme and maintain its presence	Coventry	2020
Esmee Faibairn	Newhampton Arts Centre	46,290	Towards a community mapping project, working across artforms with the residents of Whitmore Reans, from which a new role for the arts centre will be defined, exploring how it can aid community recovery.	Wolverhampton	2020
Esmee Faibairn	Birmingham Hippodrome	17,500	Towards unrestricted core costs as a COVID-19 Fast Response grant	Birmingham	2020
Esmee Faibairn	Culture Coventry	47,479	Towards unrestricted core costs as a COVID-19 Fast Response grant	Coventry	2020
Esmee Faibairn	Midlands Art Centre (MAC)	16,917	Towards Unrestricted core costs as a COVID-19 Fast Response grant	Birmingham	2020
Esmee Faibairn	African Cultural Exchange Ltd (ACE dance and music)	20,000	Towards Unrestricted core costs as a COVID-19 Fast Response grant	Birmingham	2020
Esmee Faibairn	BOM (Birmingham Open Media) CIC	29,848	Towards Core costs as a COVID-19 Fast Response grant	Birmingham	2020
Esmee Faibairn	Grand Union	22,386	Towards Core costs as a COVID-19 fast response grant	Birmingham	2020
Esmee Faibairn	Creative Academies Ltd	33,325	Towards Core costs as a COVID-19 Fast Response grant	Sandwell	2020

Esmee Faibairn	Theatre Absolute	19,375	Towards Unrestricted core costs as a COVID-19 Fast Response grant	Coventry	2020
Esmee Faibairn	Creative Academies Ltd	54,000	Towards unrestricted core costs from the Racialised Communities Top Up Fund	Sandwell	2021
Esmee Faibairn	Birmingham Education Partnership (BEP)	150,000	Towards project costs for a city-wide partnership designed to create more equal access to cultural provision for children and young people across Birmingham	Birmingham	2021
Esmee Faibairn	African Cultural Exchange Ltd (ACE dance and music)	54,000	Towards unrestricted core costs from the Racialised Communities Top Up Fund	Birmingham	2021
Esmee Faibairn	Coventry City of Culture Trust	200,000	Towards core costs of programmes delivering leadership development, disability inclusion, cultural education and widening participation in volunteering.	Coventry	2021
Paul Hamlyn Foundation	Free Radical Beatfreeks Collective	60,000	Follow-on funding will support Free Radical to build organisational capacity to deliver an expanded programme of youth-led creative activities.	Birmingham	2019
Paul Hamlyn Foundation	Grapevine Coventry and Warwickshire Ltd	95,500	To support Coventry Young Activists, a group of young adults who experience social isolation to develop, deliver and lead movement building initiatives that address the root causes of loneliness.	Coventry	2019
Paul Hamlyn Foundation	CIVIC SQUARE	384,000	To support The Front Room, the first phase of CIVIC SQUARE in Birmingham, which aims to reimagine and create innovative civic infrastructure for neighbourhoods of the future.	Birmingham	2019
Paul Hamlyn Foundation	Coventry City of Culture Trust	500,000	Support for Coventry UK City of Culture 2021, particularly underpinning two of the programming themes – Collaborative City and Caring City.	Coventry	2019
Paul Hamlyn Foundation	Geese Theatre Company	20,000	This grant provides support to aid the organisation in dealing with the challenges posed by Covid-19.	Birmingham	2020
Paul Hamlyn Foundation	Beatfreeks	20,000	This grant provides support to aid the organisation in dealing with the challenges posed by Covid-19.	Birmingham	2020
Paul Hamlyn Foundation	The Godiva Awakes Trust	10,000	This grant provides support to aid the organisation in dealing with the challenges posed by Covid-19.	Coventry	2020
Paul Hamlyn Foundation	Birmingham Contemporary Music Group	20,000	This grant provides support to aid the organisation in dealing with the challenges posed by Covid-19.	Birmingham	2020
Paul Hamlyn Foundation	MAIA Creatives CIC	29,800	This grant provides MAIA Creatives with time and capacity to undertake business planning and adaptation, and develop a revised fundraising plan for 2021/22 onwards.	Birmingham	2020

Wolfson foundation	Coventry Cathedral	250,000	Restoration work and construction of a new build annex	Coventry	2019
Wolfson foundation	City of Birmingham Symphony Orchestra	4,4000	New instrument truck	Birmingham	2019
Wolfson foundation	Royal Shakespeare Company	50,000	Costume workshop redevelopment	Stratford-upon-Avon	2019
Wolfson foundation	Coventry City Council	25,000	Restoration of London Road Cemetery	Coventry	2020
Wolfson foundation	Historic Coventry Trust	100,000	Wolfson Foundation Covid-19 Support Fund	Coventry	2020
Wolfson foundation	Royal Shakespeare Company	200,000	Wolfson Foundation Covid-19 Support Fund	Stratford-upon-Avon	2020
Andrew Lloyd Webber Foundation	Royal Birmingham Conservatoire	18,500	Scholarship to Royal Birmingham Conservatoire, 3-year BA (Hons) Acting Course	Birmingham	2019

Source: 360Giving 2021

Crowdfunding

5.87 Crowdfunding has become an important source of fundraising for arts and cultural organisations, particularly those at grassroots level. Funding websites such as Crowdfunder, JustGiving and GoFundMe not only provide financial contributions but also raise awareness of cultural organisations and the work they are doing at community and wider level.

5.88 Crowdfunding websites allow organisations to leverage the power of the masses to achieve a common goal and is often a relatively faster way of raising large amounts of funding. For instance, the MAIA Group set up a Coronavirus Emergency Fund for Artists in the West Midlands, aiming to support artists affected by COVID-19 by providing £200 hardship funds for any artists, cultural workers, practitioners and creative freelancers. The fund ran for two months from March 2020 and raised £10,285 from 183 funders, surpassing the original target of £2,000.

5.89 In 2016, Arts Council England and Heritage Lottery Fund ran a pilot project using the Crowdfunder platform to provide match funding for artists and arts organisations. A total of £251,500 was matched by Arts Council England and Heritage Lottery fund as part of a pilot which helped leverage an additional £405,911 from 4,970 backers. In total, 59 projects were funded through the pilot across the UK.

5.90 As well as financial support, 85% of fundraisers received non-financial contributions such as voluntary work offers and campaign design advice.

5.91 Nesta reported that the pilot largely attracted new supporters and finance for arts and heritage organisations rather than drawing from existing philanthropic sources.

5.92 Members of the public contributing to funding these projects were also able to provide additional gift aid as part of their funding at no extra cost to the individual.

5.93 The table below provides examples of the arts and cultural projects funded in the West Midlands through the Crowdfunder platform. It is evident from this table that Crowdfunding allows organisations to raise large sums of funding in a short period of time (lowest 28 days), with some projects receiving funding above their initial target. It also demonstrates the importance of cultural projects and venues to communities and local residents who are willing to provide donations to ensure they continue to receive the benefit of cultural provision.

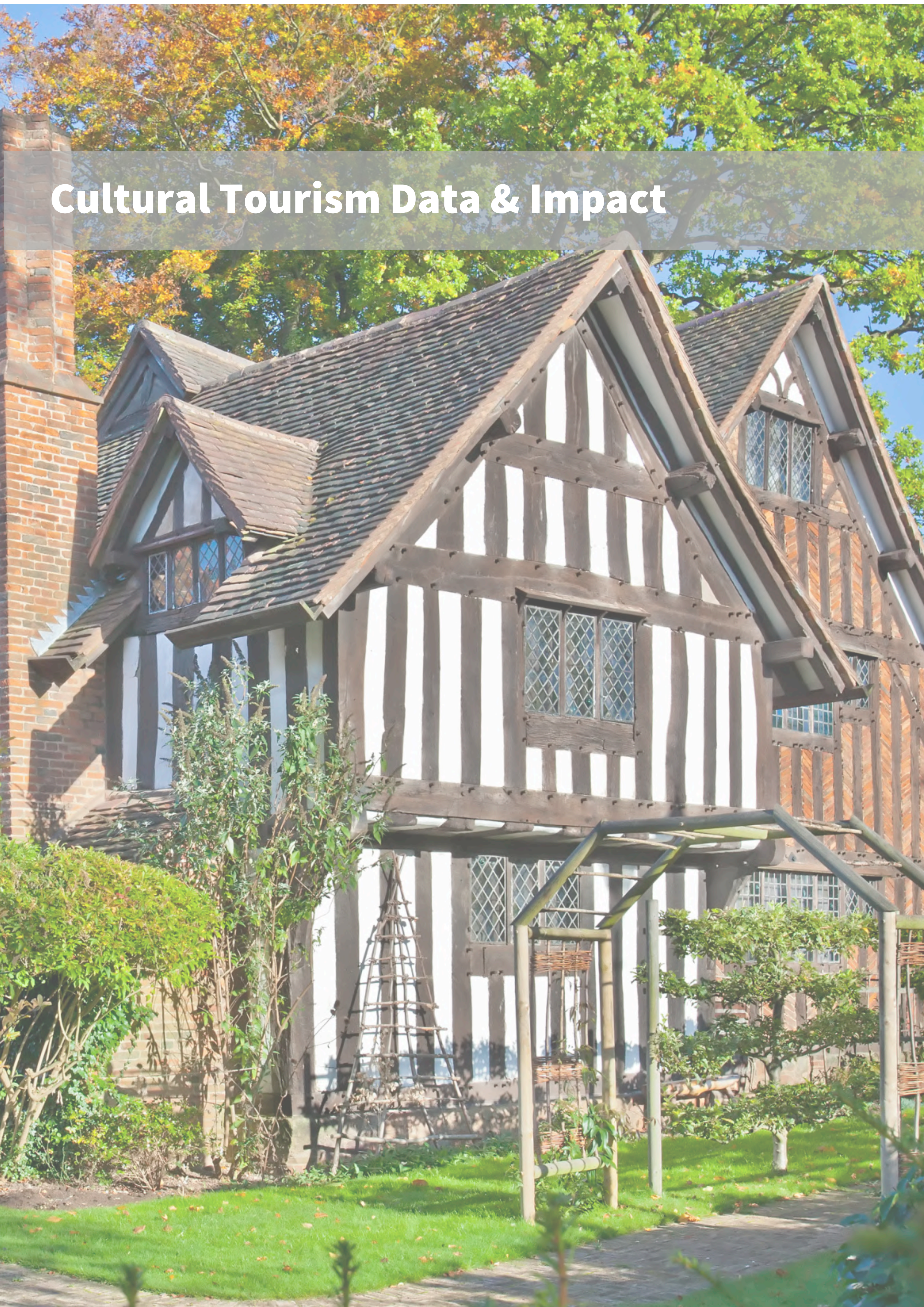
Table 5.16 Crowdfunding Projects in the WMCA Area on Crowdfunder

Project	Description	Date	Funding Received	No. of Supporters	No. of days
Birmingham opera company	Each year we inspire thousands, presenting operatic masterpieces in non-theatre spaces - combining volunteers' participation and free training with the highest artistic values, artist development, free taster events across the city and affordable ticket prices. Funding will allow this to continue to happen.	Dec 2015	£16,192	157	42
Birmingham Art Map	Free printed Art Map with a list of key exhibitions and events on offer. The map is released quarterly each year with approx. 44,000 printed maps, 13,000 website visitors and 3,000 followers on twitter.	April 2017	£7,567 (target of £6,000)	106	28
One Giant Leap, Highly sprung performance, Coventry	An arts project aiming to transform the lives and improve confidence in children	Dec 2017	£1,680	62	28
Sundragon Community Pottery, Birmingham	Aiming to build a fully accessible state-of the art ceramics studio in Digbeth with funds used for refurbishing and transforming the space	Nov 2018	£7,708 (target of £30,000 - £50,000)	96	56
Here to stay exhibition – UK tour	To raise awareness of the Windrush Generation by exhibiting portraits of project participants with the dignity and reverence they deserve. Exhibition has so far toured to London, Sandwell and Birmingham.	Nov 2018	£625	28	59
Get Crafty, Maryvale community projects, Birmingham	Funding for a weekly craft café for older people and adults with learning disabilities, using creative activities to tackle isolation and loneliness for older people and adults with learning disabilities. Birmingham Innovation Fund has provided 50% of the target amount	Dec 2018	£5,140 (target of £12,826)	17	34
The NAF Make Space, Birmingham	Project aims to provide spaces for local artists to make work, for up-and-coming artists to be trained by experienced artists sharing their wisdom, to be passed on and shared throughout the local community.	Feb 2019	£20,000	98	82
Brum Zine Fest 2019: Comparatively Stronger	Bringing together independent publishing and DIY making artists to share work and connect with new collaborators and audiences.	July 2019	£5,487	53	28

Emerge Talent Showcase, Birmingham	Showcasing under-represented artists and musicians who work in the service sector, tackling the issue of the class gap in arts.	Sept 2019	£225	9	28
Emerge Talent Showcase	Showcasing under-represented artists and musicians, who work in the service sector, tackling the issue of the class gap in the arts.	Sept 2019	£225	9	28
Public House: a new cultural space for Birmingham	Transforming unused shop space into a new space with co-working, a library and an artistic programme of events and talks. The project is currently paused due to COVID-19	April 2020	£3,290	84	28
Help us switch the lights back on, Lighthouse, Wolverhampton	Donations to put the reopening strategy into action. Donations will be used for additional signage and safety equipment, additional cleaning and additional training for staff	Sept 2020 – present	£10,736	397	233
Save Suki10c nightclub, Birmingham	Based in Digbeth Birmingham, the nightclub has faced financial strain due to COVID, the fund is looking to allow the nightclub to continue to operate and reopen when permitted by government	March 2020 – present	£0 (target of £1,000)	0	44
The Big Comfy Bookshop, Coventry	Part of a national initiative by Music Venue Trust to prevent the closure of hundreds of music venues Events have been cancelled due to COVID since March, reopening will only allow capacity for less than 20, much lower than the usual of 70. Funding will cover losses during the period of closure.	March 2020 - present	£4,024 (target of £10,000)	168	233
Arches Venue, Coventry	Part of a national initiative by Music Venue Trust to prevent the closure of hundreds of music venues. Donations will be used to cover rent and utilities cost during temporary closure due to lockdown.	Aug 2020	£1,380 (target of £5,000)	65	28
I love live by stagehand, England	Prize draw campaign organised to raise funds for the production staff and stage crew impacted by the loss of work caused by COVID-19. Providing hardship funding for live events industry workers	Dec 2020	£908,976	49,668	
Save our Brass Bands, Brass Bands England	National campaign to save hundreds of UK Brass Bands struggling to survive the COVID-19 pandemic. There are a total of 72 projects across the country being funded, including; Bilton Silver (Rugby) - £10,729 by 146 supporters. City of Birmingham Brass Band - £1,237 by 35 supporters	March 2020 – present	£133,103 + £11,038 in gift aid	2,820	
Support our museums, England	UK wide campaign run by the Museums Association. There are a total of 25 projects being funded across the country	March 2020 - present	£213,152 + £19,171 gift aid	3,710	

Source: crowdfunder.co.uk   Note: Snapshot of Crowdfunding taken in March 2021

Cultural Tourism Data & Impact



6. Cultural Tourism Data & Economic Contribution

Key Findings

- Cultural tourism is **an important economic driver** within the WMCA area, bringing both domestic and international tourists into the area. The diverse offer of the area alongside the events and festivals hosted in the area, attracts people into the region.
- Data from the WMGC Visitor Survey suggests that culture was the primary purpose of visit for over **one in five visitors** to the West Midlands (21%), with visitors coming for other reasons also undertaking cultural activities when they visit.
- We estimate that around **28 million visits** to the WMCA area in 2019 were attributable to culture. Based on average spend by each visitor, it implies that a total of **£2.3 billion of visitor expenditure** is attributable to cultural tourism in the region.
- Based on this analysis, it implies that cultural tourism generates in the order of **40,000 jobs** and **£1.8 billion in GVA**, which is roughly equivalent to **1 in 47 jobs and £1 in every £55 of GVA** in the WMCA area.

6.1 This section reviews the available data on cultural tourism in the WMCA area and the associated economic contribution that cultural tourism brings via attributable expenditure, jobs and GVA. The section:

- provides a definition of cultural tourism
- reviews contextual data on the overall visitor economy in the WMCA area
- assesses the economic contribution of cultural tourism for the area.

6.2 Given the disruption caused by the pandemic, in line with the other baseline data in this report, the analysis focusses on pre-pandemic data.

Defining Cultural Tourism

6.3 Tourism is an important sector for the WMCA area, bringing both domestic and international tourists into the area. The area's cultural offering is one of the many reasons why visitors come to the area, to experience the area's diverse offer, stretching from Shakespeare attractions in Stratford-on-Avon to its Black Country heritage.

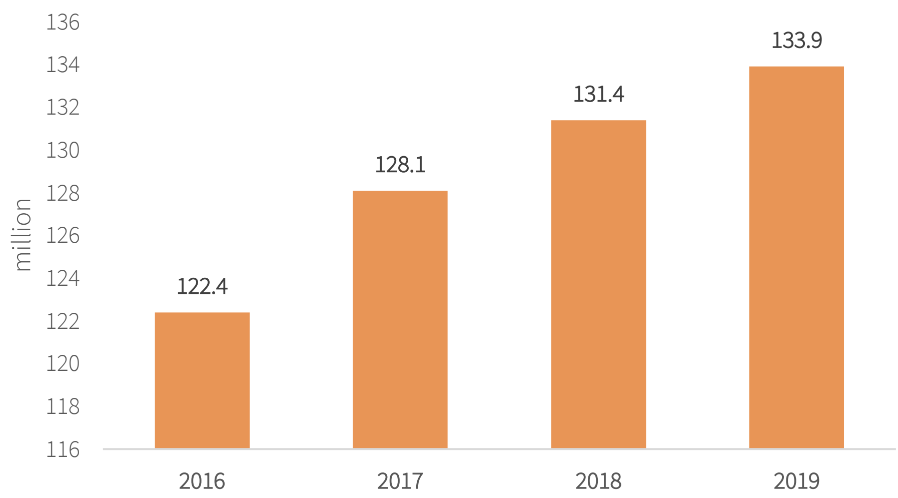
6.4 The World Tourism Organisations defines cultural tourism as: 'all aspects of tourism that can teach visitors about their past and inheritance, as well as their contemporary lifestyles'. For the purpose of this report, we have defined cultural tourism as visits made to the region from residents outside the WMCA area for the primary purpose of cultural activities. This might include museums, heritage, arts and culture, dance, comedy, theatre, music and cultural events.

Tourism in the WMCA area

Visitor numbers

6.5 Prior to the pandemic, the West Midlands Growth Company (WMGC) reported a record **134 million visitors** to the WMCA region.[12] This was a 2% increase on the previous year and is in the context of steadily growing visitor numbers in recent years, as shown in Figure 6.1.

Figure 6.1 Total visitor numbers to the WMCA area, 2016-2019



Source: WMGC

6.6 Data from Visit Britain[13] provides insights into the most popular locations and attractions for visits within the West Midlands as a whole. This revealed that Birmingham was the third most visited district, with a three-year average of 2.459 million visitors for all trip purposes between 2017-2019. It was the 7th most visited town for holiday trips, with a 3-year average 2017-2019 with 0.609 million visits

Economic contribution

6.7 The WMGC's latest commissioned analysis found that spending by the region's tourists contributed £13.1 billion of gross output/turnover[14] to the WMCA economy[15], supporting an associated 137,458 full-time equivalent jobs.[16] In line with overall visitor numbers, this has been increasing significantly every year.

[12] Source: The Economic Impact of the Visitor Economy, A West Midlands Combined Authority Report, STEAM report to WMGC, August 2020.

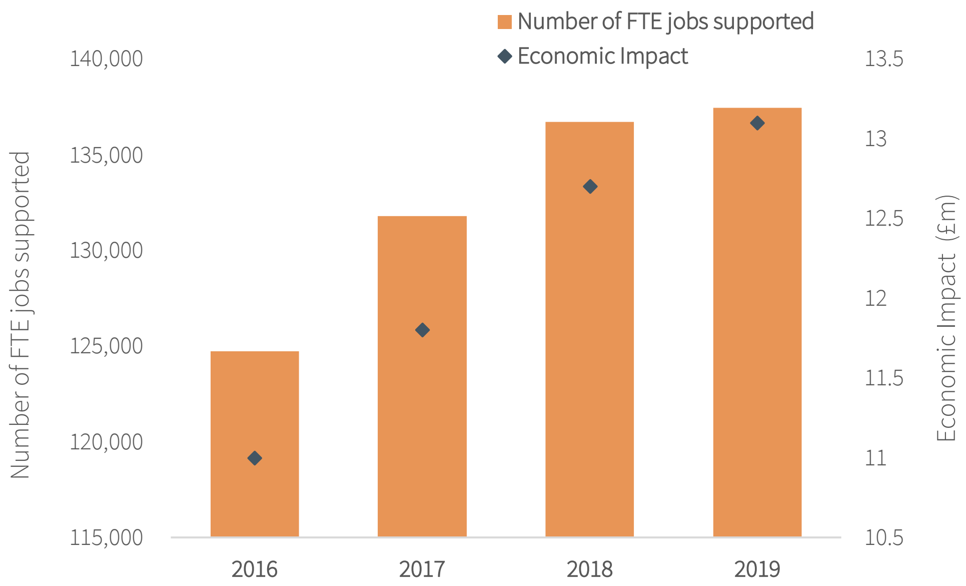
[13] GB Tourism Survey, Visit Britain, 2019

[14] Note that this is different from Gross Value Added, which measures the difference between gross output and bought in goods and services.

[15] Note: includes both direct and indirect expenditure.

[16] Source: STEAM analysis for WMGC.

Figure 6.2 Economic Impact and number of FTE jobs supported by WMCA area's Visitor Economy



Source: WMGC

6.8 Visitor patterns were illuminated by a separate survey of visitors undertaken by WMGC in 2019. This focussed on the major cities and towns within the region, including Birmingham, Solihull, Wolverhampton, Coventry and Stratford.[17] This revealed that:

- Almost six out of ten visitors to the WMCA area were on a day visit to the area (58%), with those staying overnight accounting for just over two-fifths of visitors (42%). Of those who stayed overnight, the average length of stay was 3.8 nights.
- The average visitor spent £83 per trip, with overseas visitors having the highest average spend at £91. Adjusting for the average party size of 2.1, average party spend was £175.

Table 6.1 Average Spend by Visitor Type

Visitor Type	Average Spend Per Visit Per Person
Day Visitor	£30
Domestic Overnight Visitor	£81
International Overnight Visitor	£91
Average across all visitors	**£83**

Source: West Midlands Growth Company Visitor Survey 2019, WMGC

6.9 The survey found that shopping was the highest item of expenditure for visitors (31%) followed by eating and drinking (29%) and accommodation (25%).

[17] Source: West Midlands Growth Company Visitor Survey, 2019. The survey was undertaken during April and May 2019 and provides a snapshot of visitors to the region, their reason for visiting and the type of visit being made. A total of 665 interviews were conducted over a ten-week period.

Cultural tourism

6.10 The WMGC visitor survey asked visitors about the primary activity being undertaken in the area, and also what other activities were being undertaken whilst visiting the West Midlands. **Culture was the primary purpose for over one in five visitors (21%).** This included visits to museums (7%), heritage (6%), arts & culture (4%) and theatre (2%). This is a conservative estimate since it excludes the more general category of "attractions" that was used in the survey. Essentially this means that as a collective category, the cultural offer is the most important driver behind visits to the region after shopping.

6.11 Alongside those whose primary trip purpose was culture, many visitors who are coming into the area primarily for other reasons also undertake cultural activities. 17% of visitors also visit museums during their visit, 16% visit heritage attractions and 13% participate in arts and culture.

Table 6.2 Activities Undertaken by Visitors (Main Purpose & Other Activities)

Main Activity		**Other Activities Undertaken**	
Category	% of Visitors	Category	% of Visitors
Shopping	35%	Restaurant/Cafes	68%
Attractions	12%	Shopping	31%
Business Travel	10%	Museums	17%
Restaurants/Cafes	9%	Attractions	16%
Museums	7%	Pubs & Bars	16%
Other	7%	Heritage	16%
Heritage	6%	City Centre Canals	15%
Arts & Culture	4%	Arts & Culture	13%
City Centre Canals	3%	Other	3%
Theatre	2%	Theatre	2%
Music	1%	Events – festivals	1%
Events - festivals	1%	Music	1%
Culture Sub-Total	**21%**		

Source: West Midlands Growth Company Visitor Survey 2019, WMGC
Note: Cultural activities have been highlighted orange

6.12 The table below shows the number of visits to visitor attractions in the WMCA area as reported by Visit Britain in 2019. It is clear that cultural attractions play an important role. The Midlands Art Centre (MAC) Birmingham was the most visited free attraction in the area, it was also the 14th most visited free attraction in the UK. Of the charging attractions, Shakespeare's Birthplace attracted 422,531 visitors.

Table 6.3 Visits to Visitor Attractions in the WMCA area (Top 20 Attractions)

Attraction	District	2019 visitors	% 18/19	Charging
MAC Birmingham	Birmingham	993,108	-2%	Free
Beacon Park	Lichfield	920,000	2%	Free
TOTAL Birmingham Museum and Art Gallery	Birmingham	644,100	-23%	Free
Shakespeare's Birthplace	Stratford-Upon-Avon	422,531	0%	Paid
Dudley Zoological Gardens	Dudley	311,219	5%	Paid
Charlecote Park	Warwick	250,032	20%	Paid
Thinktank	Birmingham	243,308	2%	Paid
Baddesley Clinton	Solihull	234,696	6%	Paid
Packwood House	Solihull	219,727	9%	Paid
Ikon Gallery	Birmingham	175,023	-1%	Free
Stratford-upon-Avon Butterfly Farm	Stratford-Upon-Avon	164,825	-7%	Paid
Anne Hathaway's Cottage	Stratford-Upon-Avon	146,698	2%	Paid
Shakespeare's New Place	Stratford-Upon-Avon	124,991	14%	Paid
Nash's House & New Place	Stratford-Upon-Avon	124,953	14%	Paid
Kenilworth Castle & Elizabethan Garden	Warwick	119,047	8%	Paid
Wight-wick Manor (National Trust)	Wolverhampton	112,501	13%	Paid
Hall's Croft	Stratford-Upon-Avon	85,335	10%	Paid
Mary Arden's Farm	Stratford-Upon-Avon	81,364	3%	Paid
Witley Court & Gardens (English Heritage)	Birmingham	72,606	2%	Paid
Moseley Old Hall	Wolverhampton	59,841	3%	Paid

Visit Britain Visits to Visitor Attractions 2019

6.13 The West Midlands is also home to numerous events and festivals, which attract tourists into the region. A summary of some of the largest in the region are provided below:

Birmingham International Dance Festival	• The Festival is a biennial event presenting a vibrant programme of international dance in venues across Birmingham.
Birmingham Mela	• Is the biggest South Asian music festival in Europe, bringing together music, dance, food, arts and crafts.
Stratford Literary Festival	• One of the most significant literary festivals in the UK, attracting thousands of people to the area each year.
Made Festival	• Large music festival held in Sandwell Valley Country Park
Creation Day Festival	• New music festival set to start, located in Wolverhampton.
Godiva Music Festival	• Three-day music festival organised by Coventry City Council

6.14 The West Midlands switched on to screen tourism with the 2018 release of Steven Spielberg's Ready Player One, filmed in Birmingham, and the global TV phenomenon Peaky Blinders, which is streamed to fans across the world on Netflix.

6.15 The West Midlands Tourism Awards took place in February 2020, with winners automatically entered into the VisitEngland Awards for Excellence for recognition at a national scale. 43 organisations and businesses were shortlisted for the West Midlands Awards, and many cultural institutions were winners, including:

- **Large visitor attraction of the year**: Gold – Royal Shakespeare Company, Silver – Black Country Living Museum
- **International tourism**: Gold – Shakespeare's Birthplace, Silver – Go Cotswolds
- **Accessible and Inclusive Tourism Award**: Gold – Birmingham Hippodrome, Silver – Royal Shakespeare Company. Birmingham Hippodrome went on to win Silver at the National Awards

6.16 Winners receive increased PR opportunities and recognition amongst competitors and customers which can have a knock-on effect on visitors the following year.

6.17 The region is also expecting to host some significant cultural events over the next few years, which have the potential to significantly increase the number of cultural tourists visiting the area in the future. Four of the largest of these events are summarised below.

Table 6.4 Events & Festivals in the West Midlands

Events & Festivals	Description
Coventry City of Culture, 2021	• Coventry has been chosen to host City of Culture starting from May 2021 (pushed back due to COVID-19) until May 2022. The competition, run by the DCMS, has provided a major boost in tourism, increase in investors opening new businesses and more opportunities to support the local community, leaving a legacy of cultural investment in the cities which have hosted City of Culture. • Alongside Coventry City Council, Arts Council England is managing more than £8.5 million of government funding from the DCMS, to invest in cultural venues across Coventry. • The city is estimating an additional 2.5m visitors to Coventry in 2021/22 to attend events as part of the City of Culture. In 2019, over 10m visitors came to the city (compared to 8.9m in 2016), which reflects the impact of the City of Culture status.
Commonwealth Games Birmingham 2022	• Birmingham is set to host the Commonwealth Games in summer 2022, with 5,000 athletes set to be participating from 72 commonwealth countries. • As part of the Games, there will also be a 6-month cultural programme which will provide opportunities for visitors to engage with special commissions and other cultural activity. • Between 500,000 and 1 million visitors are expected to visit the area during the Games bringing with them significant consumer spend and demand for accommodation.
British Arts Show	• The British Art Show is the biggest touring exhibition of contemporary art in the UK. The tour will be stopping at four locations across the UK, including Wolverhampton between January and April 2022.

Economic contribution of cultural tourism

6.18 There is limited evidence nationally which identifies the economic impact of cultural tourism. Analysis has been done to understand the impact of heritage tourism on the UK economy[18], which included visits to built heritage/museums & galleries and natural heritage. The identified a total spend of £17.5bn on heritage motivated trips in the UK in 2015 and a contribution to national GDP of £20.2bn. This supported 386,000 jobs in the sector. Within the West Midlands, the report identified the heritage tourism sector generated £1.0bn in GVA, supporting 22,300 jobs.

6.19 There is no single source at present that estimates the economic value of cultural tourism for the WMCA area and interrogating the existing data sources shows that they do not provide a perfect set of breakdowns that can be drawn upon to estimate this. Nonetheless, the existing evidence can be used to provide a reasonable order of magnitude, prior to the pandemic. The approach taken is as follows:

- Firstly, we have taken the latest STEAM data on visits made to the WMCA area (133.9 million in 2019) and used the data from the WMGC survey to estimate the portion of these visits that can reasonably be attributed to culture. We have used the 21% of visits primarily made for cultural activities cited in Table 6.2. This is a conservative approach because it does not attribute any of those visits for which culture was reported to be a secondary activity, and it also excludes the "attractions" category. This suggests that around **28 million visits to the WMCA area in 2019 were attributable to culture.**
- Secondly, we have assumed that average spend per cultural visit is roughly in line with the overall average from the WMGC survey (£83 per visitor). This effectively assumes that the profile of cultural visitors, their length of stay and spending behaviour is identical to the average visitor to the region. This is a strong simplifying assumption, necessitated by the lack of further breakdown available from the survey evidence, and is an area for possible further research in due course. Nonetheless, it is acceptable for the purposes of this assessment. This implies that a total of **£2.3 billion of visitor expenditure is attributable to cultural tourism in the region.**
- Thirdly, we have used the expenditure data from the STEAM model to estimate the breakdown of this expenditure by different categories (e.g. accommodation, food and drink, transport etc.). Again, whilst this breakdown may differ for cultural visitors it is reasonable for these purposes.
- Fourthly, we have matched these expenditure categories to those in our input-output model for the WMCA area and have run the aggregate expenditure through the model to estimate the direct and indirect/supply chain effects in terms of jobs and GVA supported.

6.20 This analysis implies that of the order of 40,000 jobs and £1.8 billion in GVA is generated for the WMCA area from cultural tourism, which is roughly equivalent to 1 in 47 jobs and £1 in every £55 of GVA in the WMCA area.

[18] The Impact of Heritage Tourism for the UK Economy, Heritage Lottery Fund, 2016

Economic Contribution of the Cultural Sector

7. Economic Contribution of the Cultural Sector

Key Findings

- **Direct economic contribution:** the WMCA cultural sector plays an important role in supporting the area's economy. the cultural sector directly employed a total of **16,320 jobs,** or 12,800 FTEs in the WMCA area before the pandemic. Published data tells us that the sector made a total direct contribution to GVA of approximately **£560 million**, equivalent to **£1 in every £172 of GVA** in the WMCA area.

- **Indirect multiplier effects:** the cultural sector has a significant wider effect on the economy through supply chain purchasing. Hatch's calculations using a regional input-output model shows that the cultural sector supports roughly **6,500 FTE jobs and £335 million in GVA** in other sectors in the WMCA area through supply chain effects

- **Induced multiplier effects:** as workers employed directly and those within the supply chain spend their wages and salaries, this supports further economic multipliers known as induced effects. Through our analysis, the cultural sector supports a further **3,450 jobs and £215 million in GVA** in the WMCA area through these induced effects.

- **Total economic contribution:** bringing together all of these impacts, we conclude that the total core economic footprint of the cultural sector in the WMCA area is equivalent to **22,700 jobs and £1.1 billion in GVA** (or roughly 1.2% of the WMCA economy).

- For comparison, the sector has a **larger multiplier effect in the area than that of the retail, legal and accounting, and real estate sectors.** The sector's total economic footprint is roughly similar in scale to direct employment in the low carbon and environmental technologies sector

7.1 Section 3 provided a detailed picture on employment within the WMCA area's cultural sector. This section expands the consideration of the sector's economic footprint by estimating the sector's contribution to Gross Value Added (GVA).[19] This provides us with a complete picture of the cultural sector's ***direct*** economic footprint.

7.2 We then consider the wider multiplier effects generated by the sector through supply chain (***indirect***) effects and personal expenditure (***induced***) effects. The total core economic contribution of the sector is then brought together as the sum of these direct, indirect and induced effects.

[19] GVA is the standard measure of the value of economic activity in a sector or region. It is measured as the sum of gross operating surplus (before tax, interest, depreciation and amortisation) and total compensation of employees (the income approach) or as the value of output less the value of the non-labour inputs into the production process (the production approach).

Direct economic contribution

7.3 As we saw in Section 3, the cultural sector directly employed a total of 16,320 jobs, or 12,800 FTEs in the WMCA area before the pandemic. Published data tells us that the sector made a total direct contribution to GVA of approximately **£560 million, equivalent to £1 in every £172 of GVA in the WMCA area.** The table below shows that the largest contributors to this were the broadly defined arts sector (especially performing arts, which had a total GVA of £165 million), followed by film, TV and music. The analysis implies that there is a lot of variation in the average productivity per job across sub-sectors (as measured by GVA per FTE job), with the highest in the crafts sector, and the lowest in library and archives.

Table 7.1 Direct Employment and GVA by Cultural Sub-sector in WMCA Area

Cultural Sub-sector	FTEs	Total GVA (£m)
Arts	4,870	265
Film, TV and Music	2,690	165
Crafts	980	75
Photography	640	30
Museums and Galleries	1,540	12
Cultural Education	250	12
Library and Archives	1,030	8
Operation of historical sites and similar visitor attractions	680	5
Radio	120	2
Total	**12,800**	**560**

Source: BRES, ONS 2019, Annual Business Survey, ONS 2018

Indirect multiplier effects

7.4 The cultural sector has a significant wider effect on the economy through supply chain purchasing.

7.5 Previous work has illuminated the nature of these supply chains in detail for the creative industries.[20] The cultural sector buys in a wide range of goods and services to support cultural consumption and production. For example, a theatre may purchase set specialist inputs such as design services and costumes, as well as more general inputs such as security services and food and drink for its productions. These immediate suppliers then need to purchase further inputs into their own production process, and so on. These generate a ***multiplier effect*** as the initial injection of expenditure makes its way down the supply chain, creating economic value and supporting employment at each stage. A significant amount of employment is typically, therefore, supported outside the cultural sector itself.

7.6 It is possible to estimate the nature and scale of these multiplier effects using published data from ONS in the form of its supply-use framework. This framework sets out the supply chain purchasing relationships between sectors in the economy (***intermediate consumption***) and enables us to estimate how an initial injection of spend into any sector generates these multiplier effects.

[20] See, for example, We Made That and Hatch (2019) *Creative Supply Chains Study, study for GLA* for analysis in a London context.

7.7 Hatch's regional input-output model provides data for over 100 sectors on these purchasing relationships, and the consequent multipliers. Using this we are able to estimate the multiplier effects for the Combined Authority area specifically.

7.8 Some of this supply chain purchasing takes place within the cultural sector itself – for example, if a production purchases inputs from craft producers. Therefore, we need to adjust the input-output tables to remove this intra-sectoral purchasing, in order to remove double counting within the data.

7.9 Once this double counting is removed, the estimated employment and GVA multipliers for the sector in the WMCA area are 1.51 and 1.59 respectively. In other words, for every direct job within the sector, a further 0.51 jobs are supported in other sectors in the WMCA area, and £0.59 in GVA is supported in other sectors for every £1 of direct GVA.

Figure 7.1 Indirect Multiplier Effects for the WMCA area's Cultural Sector

Source: Hatch input-output analysis

7.10 Using our earlier data, this implies that the sector supports roughly **6,500 FTE jobs** and **£335 million in GVA in other sectors in the WMCA area** through supply chain effects.

Induced multiplier effects

7.11 In addition, as workers employed directly and those within the supply chain spend their wages and salaries, this supports further economic multipliers known as induced effects. The relative scale of these is determined by the prevailing salary levels in these sectors (which are analysed for the cultural sector in Section 3).

7.12 Using the same input-output analysis, we are able to estimate the scale of these induced effects for these sectors. This analysis shows that a further 0.27 jobs are supported per direct job in the sector, and a further £0.37 in GVA per £1 in direct GVA.

Figure 7.2 Indirect and Induced Multiplier Effects for the WMCA area's Cultural Sector

Source: Hatch input-output analysis

7.13 This implies that the cultural sector supports a further **3,450 jobs and £215 million in GVA in the WMCA area** through these induced effects.

Summary economic contribution

7.14 Bringing all of these factors together, we find that the total core economic footprint of the cultural sector in the WMCA area is equivalent to **22,700 jobs and £1.1 billion in GVA** (or roughly 1.2% of the WMCA economy). For a sense of scale, this is roughly similar to total direct employment in the low carbon and environmental technologies sector. The cultural sector's multiplier effect is larger than that of the retail, legal and accounting, and real estate sectors.

7.15 This is summarised by broad sub-sector below, which shows that the arts sector makes the largest contribution to total GVA and employment given the size of the sector itself and it also has the largest employment multiplier (1.98 compared to the average for the sector of 1.78). Apart from film, TV, and music, the museums and galleries sector is also significant at 2,600 FTE jobs.

Table 7.2 Total Economic Footprint of the Cultural Sector in the WMCA Area

Cultural Sub-sector	Direct		Indirect		Induced		Total	
	FTE Jobs	GVA	FTE Jobs	GVA	FTE Jobs	GVA	Jobs	GVA
Film, TV and Music	2,690	165	1,170	85	640	60	4,500	305
Crafts	980	75	410	40	210	25	1,590	140
Radio	120	2	50	0	30	1	210	5
Photography	640	30	210	15	90	10	950	60
Cultural education	250	0	40	0	80	0	370	0
Arts	4,870	265	3,370	185	1,380	100	9,620	545
Library and archives	1,030	10	390	5	320	5	1,740	15
Museums and galleries	1,540	10	580	5	480	5	2,590	20
Operation of historical sites & visitor attractions	680	5	250	2	210	5	1,150	10
Total	12,800	560	6,470	335	3,440	210	22,700	1,105

Source: BRES, ONS 2019, Annual Business Survey, ONS 2018 and Hatch calculations

Social Impact of the Cultural Sector

8. Social Value of the Cultural Sector

Key Findings

- The cultural sector generates a number of **important benefits for society**, which go well beyond the economic benefits generated by the sector. However, there is currently limited evidence to quantify the social value the sector delivers to local communities.
- To assess the social value generated by the sector, a framework has been developed to capture the different mechanisms through which the cultural sector generates social value. The five key areas assessed are: **health & wellbeing**, **skills development**, **widening access & participation**, **volunteering**, and **enhancing the attractiveness and distinctiveness of place**.
- Better capturing the social value generated by the cultural sector will be important in helping to articulate its value to society, beyond its pure economic contribution.

Introduction

8.1 The cultural sector plays a key role in **generating benefits for society**, which go well beyond the economic benefits captured in the previous chapter. Many of these benefits are harder to quantify and are therefore often neglected in favor of easier-to-measure metrics. This can sometimes be to the determent of the cultural sector, particularly when it comes to best allocating scarce resources.

8.2 Access to culture and heritage has many benefits, such as **improving our wellbeing, providing education, and contributing to local identity.** However, currently there is no agreed approach to measuring this contribution which means that the value of culture and heritage capital is often understated.[21] In 2014, DCMS released a framework for Quantifying the Social Impacts of Culture and Sport[22] which went some way to identifying the social value generated by the cultural sector and how this could be monetised.

8.3 More recently in 2021, the DCMS released a framework to valuing the benefits of culture and heritage assets to society. The study will use the Culture and Heritage Capital Programme to quantify the benefits of culture and heritage assets. The initial study focuses on tangible assets using an approach consistent with the Natural Capital Committee and excludes assets and services which are difficult to estimate in monetary terms i.e. intangible nonphysical assets, intellectual property, soft power.

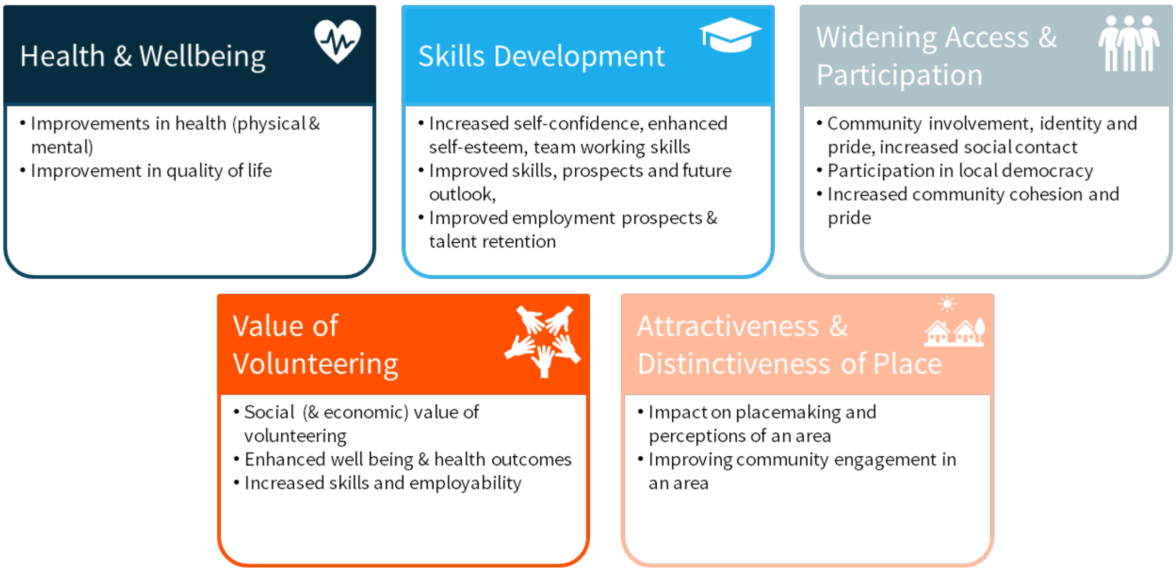
[21] https://www.gov.uk/government/news/new-research-will-demonstrate-benefit-of-culture-and-heritage-to-society

[22] Quantifying the Social Impacts of Cultural and Sport, DCMS, 2014

A Framework for Assessing the Social Value of the Cultural Sector

8.4 As discussed, there are a number of ways in which the cultural sector delivers social value beyond the measurable economic impacts that have been discussed previously. To assess the social value that can be generated from the cultural sector, we have developed the following framework which analyses the key social outcomes generated by the sector.

- **Health & Wellbeing**: engagement in culture leads to improved health outcomes and improves the quality of life for those participating in cultural activities.
- **Skills Development**: participating in culture provides an opportunity to enhance an individual's skills, prospects and future ambitions, in addition to improving their self-confidence, self-esteem and team-working skills. This in turn leads to better employment prospects for that individual, and also makes them more likely to stay in the area (if there is strong cultural provision, making the area more attractive).
- **Widening Access and Participation**: culture is a way of bridging gaps within communities and bringing people together. Participation in culture can increase community involvement, help to boost the perception and pride in an area, and also boost social contact between individuals and communities.
- **Value of Volunteering**: the cultural sector has a higher reliance on volunteering relative to other sectors. Volunteering can support the skills and employability of individuals, as well as improving wellbeing and health outcomes.
- **Attractiveness and Distinctiveness of Place**: culture has the potential to create more attractive places and help make them distinctive destinations relative to other places. By enhancing areas and improving perceptions, this helps to increase community outcomes and increase land values.



8.5 The following section analyses each of these outcomes in turn, reviewing the evidence that has already been collected, and attempting to monetise the social value where this evidence exists. Case studies showing examples of social value outcomes across the WMCA area have been interwoven into this analysis to provide real-life examples of how the sector is generating social value returns.

Health and Wellbeing

The Importance of Culture in Delivering Health and Wellbeing Outcomes

8.6 The vital role that arts and culture plays in boosting health and wellbeing outcomes for individuals and communities is increasingly recognised across the public sector. As detailed in the landmark report *Creative Health: The Arts for Health and Wellbeing*[23], the cultural sector has a number of key outcomes including:

- The arts can help keep us well, aid our recovery and support longer lives better lived
- The arts can help meet major challenges facing health and social care: ageing, long-term conditions, loneliness and mental health
- The arts can help save money in the health service and social care

8.7 The cultural sector as a whole can be seen an integral partner in the development of local health and social care plans. With a proven ability to positively impact on issues including health inequality, mental health, long-term conditions, and ageing, the creative and cultural sector makes an invaluable contribution to a healthy and health-creating society.

[23] All Party Parliamentary Group on Arts, Health and Wellbeing Inquiry Report, 2017

8.8 Many cultural venues already have programmes that target health and wellbeing. Of 2,500 museums and galleries in the UK, it is estimated that some 600 have programmes which target health and wellbeing[24].

CoLab Dudley – Re-imagining the High Street

CoLab Dudley is an experimental form of social infrastructure located right in the middle of Dudley High Street:

"We test out new creative approaches to places and experiences on the High Street that are open to everyone to meet and to grow and nurture connections".

Like many high streets across the West Midlands and nationally, Dudley High Street is in serious decline.

"Our research tells a story of a High Street in a state of decay, where people experienced isolation, loneliness, poverty, anxiety, not feeling welcome, having nowhere to create or learn or connect with others. Years of under-investment in traditional social infrastructure has led to closure, decay and a deficit in structures that support care, creativity, wellbeing and connectivity."

For CoLab Dudley the complexity of forces behind a High Street in decay demands new infrastructure. Social labs like CoLab Dudley cultivate change in completely new ways.

"Our particular focus is on imagining, experimenting and collaborating to move towards regenerative futures on Dudley High Street, those that are more responsive to uncertainty and systemic challenges."

With investment from the National Lottery Community Fund, the lab team convenes a collective of artists, creatives, makers, designers, doers and architects who have taken up the challenge to nurture imagination and long-term thinking in Dudley. They have been undertaking all kinds of research, exchanging creative gifts, and co-designing experiments; inviting local people and business reimagine the Dudley High Street of the future. CoLab supports this collective to activate collective imagining and dreams of how a town can grow and develop when communities come together seeking to address some imbalances in who has power over decisions about the places where people live, work and play.

www.colabdudley.net

Health & Wellbeing

Attractiveness & Distinctiveness of Place

Evidence of Impact

8.9 There is much evidence demonstrating the value that the cultural sector can deliver in terms of improved health and wellbeing benefits.

- **Arts prescription** projects have been shown to reduce GP consultation rates by 37% and a 27% reduction in hospital admissions. This represents a saving of £216 per patient[25]. A social return on investment of between £4 and £11 has been calculated for every £1 that has been invested in arts on prescription.

[24] All Party Parliamentary Group on Arts, Health and Wellbeing Inquiry Report, 2017

[25] All Party Parliamentary Group on Arts, Health and Wellbeing Inquiry Report, 2017

- **Music therapy** has been found to reduce agitation and the need for medication in 67% of people with dementia, [26]. Arts therapies have been found to alleviate anxiety, depression and stress whilst increasing resilience and wellbeing.
- **Participatory Arts** programmes have been found to improve and maintain health and wellbeing in communities nationally. A study conducted within deprived communities in London found that, of those people who engaged with the arts, 79% ate more healthily, 77% engaged in more physical activity and 82% enjoyed greater wellbeing. It was estimated that for every £1 spent on early care and education programmes, this has saved up to £13 in future costs.
- Central Government analysis of arts participation rates in England estimates that **NHS cost savings** due to reductions in GP visits as a result of these wellbeing benefits is in the region of £168 million per year.
- UK Theatre and the Society of London Theatre (SOLT) have released statistics which show that theatres generate an annual cost saving to the NHS of £102.2m by helping benefit the physical and mental health of those in their surrounding communities. The figure was calculated using a 2015 report by DCMS and Simetrica, which quantifies the health benefits enjoyed by people attending a cultural or sporting activity. [27]

Skills Development

The Importance of Culture in Delivering Skills Development

8.10 The UK arts and cultural sector makes a valuable contribution to the national economy by inspiring innovation, improving productivity, providing educational opportunities and boosting long term learning[28]. Studies show that children from low-income families who take part in arts activities are three times more likely to get a Higher Education degree, promoting higher skilled employment opportunities in later life[29].

8.11 The engagement of cultural institutions with schools can overcome barriers associated with lower levels of social mobility in the locality. In Birmingham 50% of wards rank in the top 10% of literacy need in England and 41% of young people did not achieve good GCSE grades in English language and maths in 2018.

[26] NHS blog: Getting creative to change people's lives https://www.england.nhs.uk/blog/getting-creative-to-change-peoples-lives/

[27] https://solt.co.uk/about-london-theatre/press-office/uk-theatres-revealed-to-save-the-nhs-102m-a-year/

[28] The Value of Arts and Culture to People and Society, Arts Council England, 2014

[29] Cultural Learning Alliance, Imagine Nation: The value of cultural learning report, 2017

8.12 Arts and culture have also been identified as having a positive impact on 'softer' outcomes, such as team working, problem solving, increased confidence, motivation and self-esteem, raised personal and career aspirations, improved attendance, emotional and social skills and management of personal relationships[30]. These 'softer' outcomes are important building blocks for young people's progression, particularly in supporting young people's transition into the workplace.

Newhampton Arts Centre (NAC), Wolverhampton: a diverse creative hub

NAC is a creative venue in central Wolverhampton that nurtures new talent and new ideas. With a wide range of facilities, it offers opportunities to enjoy and engage in the arts. As a creative hub, it supports thirty resident organisations. Residents include artists, social enterprises and charities, such as:

- Beatsabar Music Project - dedicated to helping the disadvantaged and disenfranchised young people of Wolverhampton become engaged in worthwhile and rewarding activities through the medium of music.
- Wolverhampton Social Hub – an organisation which works to refocus attention on social health and social life, helping individuals to gain a mixture of benefits, such as enhanced social support, access to a range of peer-led activities and a general boost to their mental wellbeing.
- Central Youth Theatre, which runs inspiring drama activities for children and young people aged 8 to 25.
- The Art Room – a hub and space for arts engagement and exchange.

NAC provides space for hire and place to meet for a wide range of arts and social activities. It is in many ways the 'classic arts centre' model, converging multiple uses and users. This plays a vital role as a hub and connector, particularly for third sector and socially engaged cultural practice. This kind of amenity will be critical for post-Covid recovery, providing a centre for cultural participation and exchange.

NAC has a strong voluntary element via its 'NACtivists' - an independent group of volunteers who aim to support work and sustainability of the NAC by fundraising, volunteering in practical ways, generating ideas, acting as ambassadors and raising the profile of the centre.

http://www.newhamptonarts.co.uk/

Health & Wellbeing | Skills Development | Widening Access & Participation | Value of Volunteering

Evidence of Impact

8.13 There is a range of evidence which demonstrates the relationship between engagement in arts and culture through the school curriculum. Research from the Arts Council on *The Value of Arts and Culture to People and Society*[31] shows that:

- Taking part in drama and library activities improves attainment in literacy.
- Taking part in structured music activities improves attainment in maths, early language acquisition and early literacy.

[30] National Evaluation of Youth Sector Development Fund, GHK Consulting, 2010

[31] The Value of Arts and Culture to People and Society, Arts Council England, 2014

- Schools that integrate arts across the curriculum in the US have shown consistently higher average reading and mathematics scores compared to similar schools that do not.
- Participation in structured arts activities increases cognitive abilities.
- Students from low-income families who take part in arts activities at school are three times more likely to get a degree than children from low-income families that do not engage in arts activities at school.
- Employability of students who study arts subjects is higher and they are more likely to stay in employment.
- Students who engage in the arts at school are twice as likely to volunteer than students who do not engage in arts and are 20 per cent more likely to vote as young adults.

8.14 Evidence from DCMS's *Quantifying the Social Impacts of Culture and Sport* found that:

- Unemployed people who engage with the arts as an audience member were 12% more likely to have looked for a job in the last four weeks when compared with unemployed people who had not engaged with the arts.
- Unemployed people who participate in sports are 11% more likely than non-participants to have looked for a job in the last four weeks

MAIA: Investing in artists to change the world

"Our vision is to co-create a world in which artists are free to dream, play, lead and create without limitations or barriers".

MAIA is a pioneer of creative talent development, championing opportunities for diverse talent to flourish within a wider system which has for many people proved exclusionary and closed to new voices from different backgrounds. Based in Birmingham (B5), it runs The Yard Art House – a hub, events space, community kitchen, garden and music studio. It also has two bedrooms for rental. Following the success of The Yard – as a Black-led creative hub and meeting point for talent, MAIA is fund-raising for an art hotel and music hotel – as beacons of the cultural dynamism of the Black community and as safe spaces for creative collaboration and development.

This incredibly dynamic and ambitious organisation is fuelled by a passion to give opportunity to the city's diverse talent base, hosting multiple artist development programmes, training and entrepreneurship activities.

"MAIA creates places and spaces for artists to organise, present their work and share ideas."

The crowd-sourced (with a contribution from Culture Central) 'Freedom Fund' was a "guilt-free pot of money for black artists in the West Midlands", offering 14 X £500 BURSARIES to enable Black artists to explore their talent. Most critically, MAIA is a champion for justice, inclusion and diverse arts and cultural practice. Its 'MAIA Dictionary' acts as a manifesto for social change and a set of values for a more inclusive creative talent base. MAIA works on these values to develop a safe and inclusive space and community for Black artists to build their confidence and access skills, ideas and talent.

www.maiagroup.co/focus-areas

Skills Development | Widening Access & Participation

Widening Access and Participation

8.15 Unfortunately, the benefits of the arts and culture are not enjoyed equally. People from poorer backgrounds continue to be less likely to engaged with the sector, and the same is true for people of Black, Asian or Minority Ethnic heritage. If you are disabled, come from a lower socioeconomic group, don't own your own home, or don't have higher level qualifications, you are less likely to have participated in the arts.

8.16 National data from the Taking Part Survey for 2019/2020[32] showed that those living in the 10% most deprived geographic areas in England, 59% reported having engaged with the arts at least once in the past 12 months whilst this was 83% for those living in the 10% least deprived areas.

8.17 Adults of White or Mixed ethnicity were more likely to have engaged with the arts (78-81%) than those of Black or Asian ethnicity (61-63%). This trend is similar to that observed in 2018/19. Engagement with Museums and Galleries showed similar results, with Black respondents less likely to have visited museums in 2019/20 (28%) compared to White, Mixed or Asian respondents (45-63%)

8.18 In 2019/20, men were less likely than women to report having engaged with the arts once or more in the past 12 months – 73% compared with 79%, respectively. Since data collection began in 2005/06, the trend has always been for men to be less likely than women to report having engaged in the arts.

8.19 Data reported for cultural engagement in the West Midlands varies depending on the data source, with many limitations to the data available. The Audience Strand of this study, provides more detailed, robust evidence on audience and cultural participation in the West Midlands. This report, *'Identify – Confidence – Connection: Rethinking audience engagement for arts & culture in the West Midlands'* (2021) was prepared by Indigo, Baker Richards, Mel Larsen and Pam Jarvis.

8.20 The Active Lives survey showed 65% of adults (aged 16+) in the West Midlands had attended an arts event or museum/gallery or spent time doing an arts activity compared to the national average of 70%. The table below shows data from TGI on cultural engagement in the WMCA area compared to the West Midlands and nationally.

Table 8.1 Cultural Engagement in the West Midlands, TGI

	WMCA	**Wider WM**	**All WM**	**All England**
Art galleries	21%	24%	**22%**	26%
Any performance in a theatre	38%	42%	**39%**	44%
Museums	21%	22%	**22%**	27%

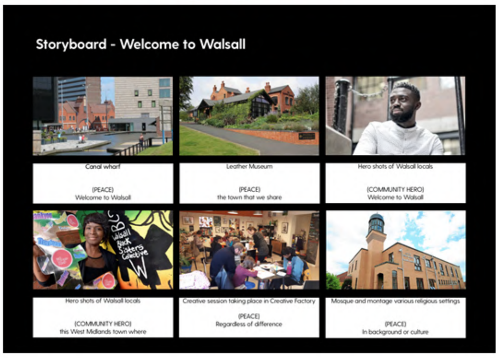
Source: TGI

8.21 Participation in arts and culture has been shown to generate added value to wider society, with strong evidence[33] showing that participation improving educational outcomes, supporting social inclusion, increasing a sense of community and citizenship and reducing crime.

[32] Taking Part Survey 2019/20, Arts Council England

[33] The Value of Arts and Culture to People and Society, Arts Council England, 2014

Method in Motion, Walsall: Inspiring Content for Challenging Times



Method in Motion is a full-service video production company producing bespoke digital content for brands, organisations and agencies. Their work in Walsall began as a commission from the Council to make a suite of videos for Walsall For All (Walsall Council), a programme and long-term strategy for creating strong and integrated communities. The audience for the films was to be those living, working and studying in Walsall and in particular the team were keen to engage with settled communities; women; elderly residents; newly arrived; disabled communities; LGBTQ+ communities; young people; and non-English speaking residents.

The commission preceded Covid-19, so when lockdown struck, the programme had to move on-line. The aims of the campaign are to: inspire individuals and groups on the themes of integration and cohesion and engage, enable and empower them to be part of the integration journey; showcase the positive work happening across Walsall to bring communities together; celebrate Walsall as a diverse borough and as a whole.

Method in Motion undertook an engagement programme and worked with local communities to help shape and inform the tone and focus of the flms: The Town That We've Built and Welcome to Walsall. Narrated by former Walsall Poet Laureate Peace, the films are an exemplar in community engagement, intercultural story-telling and the use of film as a vivid art form for place and community-making.

https://methodinmotion.co.uk/walsall-for-all-an-inspiring-video-campaign-in-challenging-times/

Health & Wellbeing

Widening Access & Participation

The Impact of Low Social and Economic Status

8.22 It is important to consider the impact of low social and economic status (SES) on cultural participation and consumption and the subsequent of these upon life chances and choices.

8.23 Greater cultural experience leads to greater Cultural Capital. Cultural Capital does not necessarily create direct benefit, but it does do is create opportunities to talk about cultural experiences or express an opinion about various cultural forms. Dialogue correspondingly creates signals that are widely shared in a given society and understood to reflect the 'right' behaviours in terms of habits, skills and tastes. One of the classic studies (Sullivan, A. (2007) Cultural capital, cultural knowledge and ability. Sociological Research Online 12) into Cultural Capital showed that, even after accounting for the child's ability level and the educational attainment of parents, access to 'cultural resources' was associated with achieving higher grades – and created greater benefit for those coming from less-advantaged backgrounds: this is known as Cultural Mobility Theory.

Coventry, UK City of Culture 2021

Coventry, as UK City of Culture 2021, has put volunteering and citizen engagement to the heart of its approach. Indeed, the process of bid development mobilised significant participation across the city and a key focus of the bid and its programme is on diversity and youth, opening up culture for the whole population. The mantra 'Coventry Moves' focuses on how the city was built from movements – social, employment, cultural etc. The latest 'move' is one of active citizen engagement and participation across all neighbourhoods of he city.

"Over the next few years Coventry will continue to move. Instilling the power & belief that everyone can move things forward. Showing that change is always possible. Using culture to move everyone".

Coventry City Culture of Trust, in partnership with EnV and CUSU, has launched the drive to recruit more than 5,000 volunteers to be part of its City Hosts Programme. City Hosts will perform a variety of roles in Coventry and Warwickshire, which include providing a friendly welcome and supporting visitors and event spectators to navigate around the city. City Hosts will be present at key transport hubs to provide an initial welcome and a farewell to visitors, while others will provide information on artworks, installations and events.

"Not only will City Hosts be celebrated for contributing to the success of the year, but they will also receive training to enhance their skills, access to discounts through a City of Culture Loyalty Scheme and the chance to widen their social circle and make new friends".

Devina Whitwell, CUSU Employability Services Manager, has signed up to be a City Host and said there are many advantages to volunteering: *"During my time as a volunteer I have gained insight into opportunities that I had limited experience in. I met new people, enhanced my employability and had experiences that would not have been possible."*

www.coventry2021.co.uk

Value of Volunteering

Widening Access & Participation

Evidence of Impact

8.24 Widening access and participation to arts and culture has been shown to have a number of positive benefits on the communities they serve:

- High school students who engage in the arts at school are twice as likely to volunteer than those who don't engage in the arts and are 20% more likely to vote as young adults[34].
- Culture and sport volunteers are more likely than average to be involved and influential in their local communities. Those who have given to cultural and sporting sectors are also significantly more likely than the general population to believe that they have some degree of influence over their local cultural facilities, and their local environment as a whole[35].
- Arts-related interventions and programmes aimed at offenders have been shown to reduce crime, with programmes helping to improve communication skills, teamwork and self-awareness, reducing the later likelihood of re-offending[36].

[34] The Value of Arts and Culture to People and Society, Arts Council England, 2014

[35] Encouraging involvement in Big Society Cultural and sporting perspective, TNS UK, 2011

[36] The Value of Arts and Culture to People and Society, Arts Council England, 2014

High Street Tales, Wednesbury

High Street Tales s part of the cultural programme of the High Street Heritage Action Zones (HAZ) project run by Historic England. Its aim is to create a set of stories to be broadcast and distributed online that celebrate the local high street, the people and communities who depend on them. Writing West Midlands (the region's Literature Development Agency) is developing stories from seven towns across England exploring the communities who live there and the role that their high street plays for them.

In Wednesbury, writer Maria Whatton has been commissioned to develop a local story. Maria is a respected British storyteller and fiction author. She was winner of Outstanding Female Storyteller of Great Britain in 2013 (British Awards for Storytelling Excellence).

The Wednesbury HAZ will deliver improvements to the historic town core and market place, with a focus on streetscape advancements and uplift to surrounding historic buildings. The strong historic character of Wednesbury is defined by the relationship of the buildings that front onto its Market Place. The architecture is a mix of Victorian and Edwardian buildings, originally of high quality but suffered over the years from lack of maintenance due to low rents and poor profit margins leading to localised market failure.

The High Street Tales project is part of the national High Street Cultural Programme led by Historic England in partnership with National Lottery Heritage Fund and the Arts Council England as part of the High Streets HAZ initiative funded by the Department of Digital, Culture, Media and Sport. The Programme includes multiple commissions, films, stories and public realm interventions, all working to re-imagine and revitalise the high street.

https://writingwestmidlands.org/projects/high-street-tales-a-project-with-historic-england/

Widening Access & Participation

Attractiveness & Distinctiveness of Place

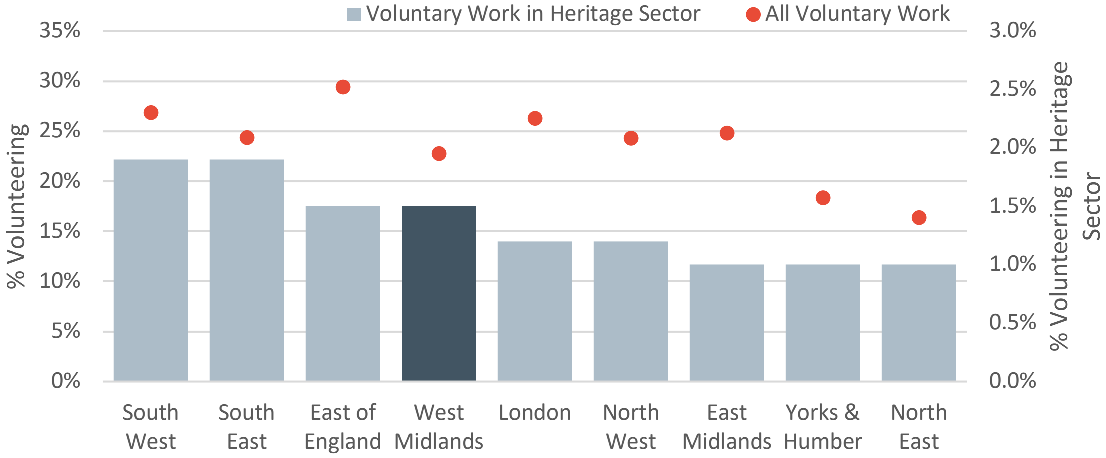
Value of volunteering

8.25 Volunteering can bring about significant change, not only to the host communities and organisations, but also to the volunteers themselves. This has both a social and economic value to society.

8.26 Volunteering initiatives can contribute to the diversity agenda. Volunteers are increasingly been acknowledged as part of the overall equation for building more diverse community of stakeholders and audiences. This has inspired lots of interesting and innovative programmes for volunteer recruitment and role management and many organisations have been challenging themselves to change their approach to volunteer recruitment from altering the nature of roles and time commitment required from volunteers (e.g. celebrating time-squeezed volunteers) to focussing on the positive impact volunteers can make to the development of their community (e.g. increasing minority representations in recruitment, including volunteers with lived experience, giving them active decision-making roles, and visibility).

8.27 Current volunteering levels in the West Midlands are slightly lower than the national average. Nationally 24.4% of people have done some voluntary work in the last 12 months compared to 22.8% in the West Midlands region. Data relating to cultural volunteering is only available for the heritage sector, in which 1.5% of the West Midlands population have undertaken voluntary work in the last 12 months.

Figure 8.1 Volunteering Levels, Across all Sectors (LH) and in Heritage Sector (RH)



Source: Taking Part Survey, 2016

Creative Black Country: 'Making the most of the Black Country through arts, culture and creativity'

Creative Black Country (CBC) is an action learning project funded by Arts Council England through the Creative People and Places (CPP) programme to engage audiences in areas where evidence shows people are less likely to take part in publicly funded arts and culture:

"CBC work with communities in Dudley, Sandwell, Walsall and Wolverhampton to explore and develop new creative projects with local people in the places where they live". high street as a living lab for urban renewal.

CBC is led by a Core Consortium of: One Walsall, Sandwell Council of Voluntary Organisations, Wolverhampton Voluntary Sector Council and Dudley Council for Voluntary Service (working as Black Country Together CIC); and Multistory, Black Country Touring and Black Country Living Museum (which are all Arts Council England National Portfolio Organisations). This consortium brings together the community and voluntary sector and the expertise of professional arts producers with a long-standing commitment to the Black Country's creative and cultural ecology and a depth and breadth of knowledge of leading contemporary arts practice.

Of several programme areas, Creative Communities stands out for its role in supporting communities to co-create new work that is relevant, authentic and genuinely participatory. The programme also offers support to help communities to develop their skills and confidence in accessing and developing creative and cultural activities. Micro investment (up to £500 per project), coupled with specialist advice and guidance, is used to seed new types of community-led creative practice. In turn, this facilitated support helps to connect local participants to professional artists and organisations – building actively engaged creative communities with outcomes such as enhanced confidence, improved wellbeing and civic pride.

www.creativeblackcountry.co.uk

Value of Volunteering | Widening Access & Participation

Evidence of Impact

8.28 Evidence from DCMS's *Quantifying the Social Impacts of Culture and Sport*[37] found that:

- People who engage with the arts as an audience member are 6% more likely to have volunteered frequently (once a fortnight or more)
- People who participate in sport are 3% more likely to volunteer frequently
- Those who engage with the arts as an audience member are also gave £50 per person more in charitable donations over the last year
- People who participate in sport gave £25 more per person in charitable donations over the last year

8.29 An evaluation of the AV festival[38] cited that the festival's volunteer programme had noticeable effects on its volunteers, within a relatively short time. The large majority of volunteers reported improvements in their communication skills, their self-confidence and their willingness to try new things. They also reported feeling that they were making a useful contribution, that they had had a chance to make some useful contacts and to meet like-minded people, and that as a result they were more employable.

Attractiveness & Distinctiveness of Place

8.30 Investment in cultural assets can rejuvenate places, leading to positive economic and social outcomes at a local level. It can help to retain and grow a highly skilled workforce, attract tourists to bolster local business, and provide opportunities to grow people and communities' connections with places. Additionally, supporting the development of a more positive relationship between people and place can have a positive impact on both mental and physical health. In short, culture and heritage are things that people up and down the country bring people together and strengthen communities.

8.31 Perception of place is an important 'pull' factor in investment and business location decisions and can affect a place's capacity to attract talent – especially young people – and retain workers. Many towns already have a strong heritage and sense of place, and benefit from their cultural and civic assets both directly, from tourism and visitor revenue, and indirectly, by inspiring a sense of local pride and community cohesion, making places more attractive to live and work in.

8.32 The cultural sector can play an important role in rejuvenating communities, providing investment and an anchor point within existing and emerging centres.

Evidence of Impact

8.33 Research by Simetrica-Jacobs and Nesta has helped inform the DCMS framework and programme of research with figures showing how much visitors value their engagement with culture and heritage:

- Arts Council England has shown that people value a visit to a regional gallery at an average of over £5.40 per visit. Those who live close to the gallery (i.e. local visitors) report a lower willingness-to-pay on (WTP) average than those who live further away (i.e. non-local visitors; £4.41 and £6.65 respectively). An average

[37] Quantifying the Social Impacts of Cultural and Sport, DCMS, 2014

[38] AV Festival Evaluation, BOP Consulting, 2012

WTP a one-off donation for a gallery the survey respondent had not visited is £3.72 per person, with a lower bound of £3.20

Theatre Absolute, Coventry – Long-term Cultural Engagement in the Heart of the City

Established in 1992, Theatre Absolute is a pioneer of open, collaborative, generous and respectful theatre development. In 2009 they founded the UK's first professional Shop Front Theatre in an old fish and chip shop in Coventry City centre. This kickstarted a whole movement of city centre cultural infrastructure in old retail and office space, with artists' studios, maker spaces and theatres 'popping up' in city centres across the country. Many of these activities were meanwhile, but Theatre Absolute have developed very deep roots in their shop front theatre on City Arcade.

This gives Theatre Absolute a level of visibility and accessibility, symbolising a commitment to the city and to art and culture as a social right for everyone:

"It's not just Theatre Absolute working in the shop. The space is available for hire to other community organisations, individual artists and users. It is open all year round, shape shifting to suit various needs: a theatre performance space, a rehearsal space, a gallery space, a dance space, a city centre 'living room' and much more…After twenty years touring work for studio theatres, we were craving new ways to think about how we worked, and to connect better with our local community and the audiences for whom the work is ultimately made".

Theatre Absolute works as a hub and enabler, inviting artists to respond to open calls and commissions. This includes a portfolio of incredibly diverse practice and a network of associates which is as diverse as the city's population. Humanistan is their artistic programme for 2019-2022. Nine new works are being commissioned, provoking audiences to critically engage with the ongoing social and economic crisis. The first major commission was for Birmingham-based artist and activist Amahra Spence, who wrote and performed Utopia at the Shop Front Theatre. Set against the backdrop of deportations, Amahra's solo piece told the story of three individuals each brought together to find support and belief in their collective power.

www.theatreabsolute.co.uk

Widening Access & Participation

Attractiveness & Distinctiveness of Place

- Arts Council England also found Visitor WTP to support theatre Community outreach programmes was £13.62 as a one-off donation over the life of the programme, with a lower bound of £11.49. Theatre non-visitor WTP to support community programmes was £4.57 as a one-off payment, with a lower bound of £3.77. Visitor WTP for community programmes was £11.47 for Birmingham Rep.
- Historic England has shown that households on average value the historic character of their local high street at around £7.80 per year.

Table 8.2 Willingness to Pay based on Category of Heritage

Category of Heritage Site	Mean WTP per household per year
Pre-industrial high street	£7.80
Industrial-era high street	£6.31
Town halls	£5.73
Central libraries	£7.67

Source: Historic England

8.34 The recent Arts Council Cultural Infrastructure data report[39] shows that culture has strong presence on high streets and provide additional amenities for the public: nearly a quarter of cultural organisations funded by Arts Council provide additional amenities for the public, including cafés, bars of bookshops. This shows that cultural facilities have a strong role to play in the future of towns and high streets. This is particularly crucial given the challenges facing high street retail and town centres in a post-Covid-19 world.

Civic Square: Visioning, building and investing in civic infrastructure for neighbourhoods of the future.

Civic Square is (or will become):

- **A Public Square**. A place to gather, make, create, grow, organise, play and connect.
- **Neighbourhood Economics Lab**. An experimental social lab, focused on exploring, experimenting and testing and building resilient, regenerative neighbourhoods.
- **Creative + Participatory Ecosystem**. A connected, collaborative, and open platform, shaping everyday experiences by placing creativity and participation at their heart.

CIVIC SQUARE

Civic Square was born out of the work of Impact Hub Birmingham – which sought to reimagine notions of public space, community infrastructure, the role of neighbourhoods and even the role of the artist in society. It is a test bed for new thinking on notions of public space, participation and engagement.

The physical square is yet to exist, but the process of its development is one which explores how the city can become more legible, interactive, accessible and inclusive. It provides a process and platform for testing ideas, re-framing approaches to planning and development, and allowing us to dream. It is supported by The Community Fund, Esmee Fairburn and Paul Hamlyn Foundation.

The Front Room is the first phase of Civic Square – a canalside hub for creative exchange, events and mutual support: www.thefrontroom.cc It has kick-started a process of civic change, with a commitment to place-making which is genuinely co-created and driven through experimentation and critical dialogue.

https://civicsquare.cc

Widening Access & Participation

Attractiveness & Distinctiveness of Place

8.35 Cultural facilities and infrastructures are attracting visitors, and in this way play an important role in supporting the local economy through spending on local accommodation, restaurants and shops:

- Recent research published by the Association of Independent Museums[40] estimates that independent museums attract more than 24 million visitors per year and through visitor spending contribute around £440 million to local economies. Around 10 million of the visitors are day/overnight visitors, including international visitors.
- Of the ten projects funded by the phase 2 of the Cultural Destination Programme (Arts Council, 2020) which have developed and implemented new cultural

[39] Data report: Arts Council-funded cultural infrastructures, 2021 https://www.artscouncil.org.uk/sites/default/files/download-file/Data%20report%20-%20ACE%20Funded%20cultural%20infrastructure%20FINAL%20v2.pdf

[40] AIM (2019)- 'Economic Impact of the Independent Museum Sector'.

products from cultural itineraries/trails, new galleries or exhibitions to outdoor cultural events, half of them noted increases in visitor numbers and an increase in the value of tourism locally[41].

Gallery 37 & The P-Word – Creative Talent Development Platforms

Gallery 37 is a creative development programme investing in north Birmingham and its young artists through masterclasses, 'hyper local commissions', residencies and workshops. It is Led by Punch and Saathi House. Activities include music production masterclasses, digital illustration classes, support activities (e.g. dialogue on mental health), and many other tailored support and development activities.

The Commissions Programme is a pioneering approach to neighbourhood-based practice, working with young and diverse communities to develop participatory art projects which enhance and re-imagine the public realm. Commissions include:

- **WANDER WATER**, where female-artists respond to the female experience of walking local canals, providing the opportunity to change perceptions and increase footfall along Birmingham's canals, promoting health and wellbeing.
- **LIGHT NIGHT**: A visual artist will create three / four light-based, highly visual, LED, neon or projection installations celebrating the heritage and cultural diversity of the Birchfield local area.
- **REMASTERING MOTHERS**: An experienced artist will create a sculpture to celebrate the music and legacy of Erdington's "Mothers" music venue during the 1960's-70's.
- **DOWNLOW**: A Lozells-based programme bridging multiple locations through participatory creative activities and social action. This project will kickstart the creation of up to twenty new public artworks.

The P-word is a leadership development programme for diverse artists & entrepreneurs in Birmingham. It specifically targets professional and practical 'roadblocks' preventing business growth and success. It is based on a partnership with Punch and Aston University. It is supported by leadership experts from The Centre For Research In Ethnicity Minority Entrepreneurship - "CREME" and connects directly into tiered business programmes offered by Aston University Business school.

www.wearepunch.co.uk /gallery37

Health & Wellbeing | Skills Development | Widening Access & Participation | Attractiveness & Distinctiveness of Place

8.36 A 2019 study[42] by Wavehill Ltd. for ACE showed evidence of how a strong arts and cultural offer within a place can attract and retain individuals and businesses and help to shape its identity. Key findings from the report include:

- The national survey findings demonstrate that arts and culture **support personal wellbeing.** A strong arts and cultural offer makes people feel more content and thus more likely to stay within an area.
- Engaging in local arts and cultural activities is valuable in fostering a **sense of collective identity**, space for interaction and shared experience and thus contributes towards people having a stronger attachment to a place.
- Arts and culture was cited as an **equal priority to 'schools'** in people's decision to move to, or remain in an area. These findings support a notion that a strong local arts and cultural offer can play a role in attracting and retaining workers. their

[41] Arts and Place Shaping: Evidence Review, May 2020, Wavehill for Arts Council England

[42] The Value of Arts and Culture in Place-shaping, August 2019, Wavehill for Arts Council England

local area as a place to live, which can contribute towards stronger worker retention rates.

- There is recognition that a strong arts and cultural offer **helps businesses to sell** the benefits of moving to an area in relation to improved quality of life and encouraging a positive work and life balance.
- A strong arts and cultural offer can support efforts to **maintain or enhance the attractiveness of retail centres as places to live**, work and visit by offering unique experiences for visitors and/or shoppers through the animation of public spaces including art works, live performances and opportunities for local cultural identity to be explored and celebrated.
- The most recent survey of Business Improvement Districts, conducted by British BIDS in 2018, acknowledges the role of culture and arts as an **innovation tool** and also in helping to **attract visitors and increase footfall.**

Conclusions & The Case for Culture

9. Conclusions and Recommendations

9.1 This report provides a detailed evidence base on the cultural sector in the West Midlands Combined Authority area. It covers a wide-ranging, pre-pandemic baseline on cultural sector infrastructure and assets, employment, economic and social value, visitor economy spillovers, and skills.

9.2 This section draws out key conclusions from the research, and recommendations for the future.

Conclusions from the research

The region's cultural sector is an important economic entity in itself, but is grossly under-recorded in published data

9.3 Measured in narrow terms, the region's cultural sector directly employs 16,320 people. Alongside core cultural occupations this includes other roles within cultural organisations such as retail and accounting. This is one of the largest cultural sectors when compared to other combined authority areas in England, and represents just under 1 in every 100 people in employment in the region. However, given the huge importance of freelancers in the cultural economy, this is a significant under-estimate. Other research suggests that the cultural sector could have up to an additional 50% headcount once freelancers are included.

The region contains nationally significant concentrations of culture

9.4 The sector's presence is felt across the WMCA area, but there are particular specialisms and hotspots around the region. All of the constituent LEP areas host significant concentrations. Examples include crafts in Birmingham and Walsall, performing arts in Stratford-on-Avon, heritage in Warwick, Solihull and Nuneaton; and museums and galleries in Dudley, Coventry and Lichfield.

Culture supports wide-ranging spillovers on other sectors in the region and beyond

9.5 There are strong linkages and spillovers between culture on other sectors in the regional economy. Our analysis shows that every direct job in the cultural sector supports a further 0.78 of a job in the wider economy. This is a higher multiplier than sectors such as retail, law and accounting. The sector's estimated regional economic footprint of 22,700 FTEs and £1.1billion in Gross Value Added is similar in scale to the direct contribution of the region's low carbon and environmental technologies sector, and larger than sports, amusement and recreation in the region.

It plays an especially important role in the visitor economy

9.6 One of the most important spillover effects from culture is on tourism. The evidence shows that more than one-fifth of all visits to the region are motivated by culture, drawn by the quality and range of cultural assets. By attracting these visits, culture serves to pull in additional expenditure and support significant economic activity in other sectors such as hospitality, retail, and transport. Our analysis shows that cultural tourism supports an estimated 40,000 jobs and £1.8 billion in GVA in the region, equivalent to around 1 in 47 jobs.

The sector is integral to social wellbeing

9.7 The sector's societal value goes well beyond the economic and the monetary. There is a growing evidence base on the sector's role in supporting social value. This report has uncovered compelling examples of the ways in which the region's cultural sector drives social value by enhancing health and wellbeing, skills development, widening access & participation, volunteering, and enhancing the attractiveness and distinctiveness of place.

Prior to the pandemic, the sector was growing strongly but has been hit extremely hard by the restrictions

9.8 In the five-year period leading up to the COVID-19 pandemic, the WMCA's cultural sector grew by 20%. This was much higher than the trend for most sectors in the region and well in excess of the England average of 13%. However, the pandemic has had a devastating impact, especially on the community of freelancers in the region.

There remains a lack of diversity amongst the cultural workforce

9.9 Whilst there is variation by sub-sector and occupation, it remains true that ethnic minority groups and lower socio-economic backgrounds are significantly underrepresented in the sector.

There is a healthy pipeline of skills and talent, but with possible threats

9.10 The research has shown that there is good provision of, and participation in, cultural related FE/HE courses across the WMCA area. There are also some encouraging signs that learners are relatively diverse. However, at the time of writing there are notable threats to arts and humanities subjects emerging from the Augar Review of Higher Education and related policy on which the Government is currently consulting.

Recommendations

9.11 The report has drawn primarily on published sources and economic modelling. Whilst this has enabled a comprehensive overview of the sector in the region, there are a number of areas in which the evidence could be strengthened going forward with further quantitative and qualitative research. These include:

- Better capturing the role of **freelancers and micro-enterprises** in the sector. A problem across the sector, and not specific to the WMCA area is the difficulty in capturing the number and value of freelance activity in the sector. National evidence[43] has started to shine a light on this but there remains an evidence gap. Recent efforts in Coventry and Warwickshire LEP[44] to better understand the scale of freelance work locally could be built on and extended in the WMCA area.
- More systematically capturing the value of **cultural tourism**. Whilst our review has been able to provide a reasonable baseline estimate, there is the opportunity to

[43]Creative Industries Policy and Evidence Centre (2021) Freelancers in the Creative Industries Creative Industries Policy & Evidence Centre (pec.ac.uk)

[44] Coventry and Warwickshire LEP (2020) *The Freelancer Gap* CWLEP_Freelancer_Gap.pdf (sarahwindrum.co.uk)

commission regular survey research of visitors. This would provide more granular and specific data to inform assessments of the sector's contribution to the visitor economy. This may be especially helpful given the need to understand the disruptive impacts of the pandemic on the baseline profile of cultural visitors to the region, and to track the impact of major forthcoming events including City of Culture and the Commonwealth Games.

- Assessing the role and value of **individual institutions** in the region. Our evidence base captures a macro view on cultural value as well as evidence on particular locations within the region. There are gaps in the evidence on the economic and social value of individual major cultural institutions, which could be filled by future research. This would help equip these venues to bid for various funding streams by robustly demonstrating their wider value.
- On a related point, the WMCA could consider commissioning a regular **survey of cultural institutions** in the area (as is done in Greater Manchester, for example) to capture key information on their operations, economic impact, social value and future issues/support needs. This would enable useful information to be collected as well as economies of scale to be achieved in analysis of socio-economic value.
- There remains a qualitative evidence gap on the **impact of Covid and Brexit** on the sector. This is very difficult to bridge until Covid recedes, and the impacts of Brexit on trade, investment and branding will only start to be seen clearly once the pandemic is over.
- Investigating **diversity** in the sector in more detail. It is widely known that the sector does not represent the diversity of the wider population. There is scope to examine this a lot further and in more detail in the WMCA area, in order to inform potential future interventions to address this.
- The **role of cultural infrastructure in shaping, animating and rejuvenating places, structures and streetscapes** is key and should be better understood. Through the development of our cultural mapping classification framework, we identified 'Outdoor event spaces' and 'Environmental attractions' as key typologies. This initial mapping provides a foundation for future qualitative and qualitative research to understand better the opportunities but also the barriers and constraints for engaging with cultural experiences outside of traditional cultural venues and for embedding culture into the region's diverse places.
- Exploring the **intersection between technology software, infrastructure and hardware** (such as websites, location-based apps, wi-fi hot-spots, kiosks and beacons) is another area of future research to enhance understandings of cultural spaces and activities in the digital age. Qualitative and quantitative research would help raise awareness of existing connections between software, infrastructure and hardware, as well as identify new opportunities. For example, by digitally connecting with new audiences and consumers; supporting wayfinding between venues and villages; as well as examining the physical analytics of movements in cultural spaces.
- Going forward, **the value of the cultural infrastructure map will be in how much it can become a 'live' resource** which is updated and improved regularly.
    - The impact of COVID-19 and the subsequent recession will have a fundamental impact on the future of the creative and cultural sectors as well as the role they play within the region. As a tool, the map might be able

to offer new ways of understanding the interface between available space, occupier demand and sector needs. The relationships to health and wellbeing, climate emergency and diversity and inclusion might all be areas in which to tread new ground.

- The map should not be a static piece. In the future, it could better reflect the changing nature and needs of the sector and be a powerful tool for successful cultural infrastructure planning. Planning effectively for cultural infrastructure will become increasingly complex, with cultural uses experiencing much of the same pressures to that of industrial and office uses: rising land prices, increasing business rates and pressure from higher value residential uses. By overlaying planning, economic, and socio-demographics data to it, the map could become a powerful tool for decision-makers, planners, developers and sector stakeholders to effectively protect and plan for cultural infrastructure in the region.

9.12 The evidence base should be a helpful resource to inform strategy development for the sector, as well as bids into place-based funds from Central Government. Whilst it is not the remit of this evidence base report to provide strategic recommendations per se, from our analysis and consultations in the region, we are able to offer some reflections:

1) A core goal should be to aim for a **genuinely inclusive and diverse cultural sector**. New infrastructure and programmes must be designed to open-up access, provide talent pathways, and invigorate a sector which does not reflect the diverse talent base of the region. This requires both a neighbourhood-based approach and a regional approach which better connects assets and enables creative talent to access professional opportunities.

2) Given the challenging environment for **high streets / town centres**, these can be the platforms for a next generation of culture-led development. This will need to go beyond meanwhile solutions and be part of a step-by-step approach to consider town centres as offering a fabric of cultural opportunity, linking different parts of the value chain and energising spaces across a range of art forms and activities.

3) There is an opportunity to look at further **exchange of ideas and coordinated programme activities between different parts of the region** – drawing inspiration from the London Boroughs of Culture model. This could include twinning activities between different neighbourhoods, cultural mobility and exchange activities such as residencies, and network-based activities which seek to build a regional identity and voice for the sector.

4) There is an opportunity to **align cultural development, public realm and transport infrastructure activities** – for example, the extension of the WM metro and HS2 give impetus for new cultural infrastructure, public art, social infrastructure (festivals, events, training etc.) proximate to transport nodes. This is also a way of designing-out the disconnect between different neighbourhoods.

5) There are **threats to cultural education** in England emerging from national policy on university funding and the measurement of the "value" of particular courses in the arts and humanities. Given the strong base of provision in the WMCA, it will be important that partners ensure that the value of this provision, and the role it has in supporting the vibrancy of the cultural sector, is fully understood in Government.

6) Our analysis of clusters within the region suggests there is a **narrative gap** that could be filled. For example, Dudley can be a pioneer for creative production in an industrial and geological heritage landscape. Leamington can push harder as a centre for the creative freelancer - a hub which connects with the rural parts of the county and a feeder to the larger clusters in Birmingham and nationally. North Birmingham could become a leader in genuinely diverse and equitable sector development and become the regional hub for diverse creative practice. These narratives and identities could be developed further to encourage place branding and inward investment.

7) There is a very significant **post-Brexit threat** which is currently under the cover of Covid. When the economy opens up further, the region will need to move fast to connect with partners and markets in the EU - to arrest any more divergence and to recover as much lost soft power as possible.

8) The future development of the cultural sector should be underpinned by **inclusive growth**, environmental responsibility and linking culture to the UN Sustainable Development Goals. The sector is integral to social wellbeing and inclusion, which are critical underpinnings for any kind of 'good growth'.

9) **Healing and recovery** will be vital for the next few years - and the cultural sector can play a starring role if it is resourced to do so. Cultural prescribing, a ramp-up in cultural participation, and culture as a key part of place-making will generate multiple benefits across different policy agendas.

Appendix A - SIC Code Definitions

Subsector	SIC07	Description
Arts	9001	Performing arts
	9002	Support activities to performing arts
	9003	Artistic creation
	9004	Operation of arts facilities
Film, TV and Music	1820	Reproduction of recorded media
	3220	Manufacture of musical instruments
	4763	Retail sale of music and video recordings in specialised stores
	5911	Motion picture, video and television programme production activities
	5912	Motion picture, video and television programme post-production
	5913	Motion picture, video and television programme distribution
	5914	Motion picture projection activities
	5920	Sound recording and music publishing activities
	6020	Television programming and broadcasting activities
Radio	6010	Radio broadcasting
Photography	7420	Photographic activities
Crafts	3212	Manufacture of jewellery and related articles
Museums and galleries	9102	Museum activities
Library and archives	9101	Library and archive activities
Cultural education	8552	Cultural education
Operation of historical sites and similar visitor attractions	9103	Operation of historical sites and buildings and similar visitor attractions