

10.9 Conclusion

10.9.1 Across a range of social and welfare measures the South West fares relatively well in comparison with many other English regions. The evidence also shows that people in the South West support each other in a variety of formal and informal situations. However, society is by definition a complex and dynamic construct which is experienced differently by its different members. In that context this chapter can give only a limited insight into the social shape of the region and the challenges for policy makers and individuals alike. For a broader understanding of life in the South West region see also the other chapters in this publication which explore a range of economic, social and environmental evidence.

11 Culture

11.1 Issues and Priorities

- Culture is both an economic sector and an important dimension of the region's rich and diverse way of life, contributing to a distinct and recognisable identity.
- Creative Industries, as an industrial grouping within the cultural sector, is identified by the South West Regional Development Agency as a priority sector for the Regional Economic Strategy (RES). Tourism is a major industry and also prioritised because of its strong contribution to the region's economic and cultural growth.
- Sustained development of the region's cultural assets and facilities, and full participation and enjoyment of them by the region's citizens and visitors, are important priorities for policy-makers and investors.

11.2 Key Data

- Creativity, intellectual property and the range and quality of cultural amenities play a crucial role in defining and shaping the South West's competitive advantage and its national and international standing, (SWRDA 2006).
- Cultural sector business turnover is growing, with a 29% increase between 1998 and 2005, (ONS 2006).
- Creative Industries, a smaller industrial grouping of the cultural sector, make a significant contribution to the region's economy, According to the Regional Economic Strategy Evidence Base, this sector generated revenues of £5.54 billion and GVA of £1.847 billion in 2001 (£2.024 billion in 2002) (SWRDA, 2007 ⁽¹⁾ ⁽²⁾). Employment grew by 8.2% between 2000 and 2004, compared to a 1% decline across Great Britain. In 2004, the sector supported 53,300 jobs of which a high proportion were concentrated in the West of England sub-region (18,300), although Devon exhibited a high growth rate of 75% from 1998 to 2004.
- Families in the South West spend more on 'recreation and culture' as defined by the Office for National Statistics (ONS) than they do on either housing, or food and non-alcoholic drinks. 'Recreation and culture' is the second largest category of average weekly household expenditure in the South West after transport, (ONS 2003).

1 **Regional Economic Strategy 2006 - 2015 EVIDENCE BASE**

2 http://download.southwestrda.org.uk/res/general/evidence_base.pdf

- According to the UK Tourism Survey and International Passenger Survey, domestic visitors contributed, in 2007, an estimated £3.8 billion in expenditure to the region's economy and inbound visitors contributed £840 million.
- Between 2001-04, the South West was granted the fifth highest level of Lottery funding for cultural activities of the nine English regions, receiving £198 million compared to the national average (excluding London) of £183 million, (Kingshurst Consultant Group 2004).
- Participation and attendance rates by adults in cultural activities are relatively high in the South West with 73.2% making at least one visit over the past 12 months to a heritage environments and 73.5% to an arts event compared to other English regions (DCMS, Taking Part Survey, 2007 ⁽³⁾)
- An above average rate of 21.9% of adults (aged 16 and over) in the South West are regularly active compared to the national average of 21%. However, nearly half (49.2%) of adults do not take part in any moderate intensity sport or active recreation ((ipsos MORI Active People Survey, 2006).
- Cultural activities such as hobbies, sports, religion and volunteerism are shown to promote health and well-being in later life and to generate social capital (Hennessey and Giarchi, 2006)
- Cultural assets and resources are essential to the region's economic prosperity, regional identity and to a sustainable tourism industry. Following public consultation on the region's cultural spatial plan, *People, Places and Spaces: A Cultural Infrastructure Development Strategy will be published in spring 2008 (Culture South West <http://www.culturesouthwest.org.uk>).*
- Research by a national tourism and heritage partnership shows the positive and negative impacts of climate change on cultural assets and visitor numbers of equal application to the South West where heritage and tourism make significant contributions to economic and cultural sustainability, (Cassar, M. 2005).

11.3 Introduction

11.3.1 In this chapter 'culture' is principally taken to mean the 'cultural sector' as defined by the Data Evidence Toolkit (DET) published by the Department for Culture Media and Sport (DCMS) ⁽⁴⁾. Most data on business count, employment and turnover presented in this chapter are derived from the Standard Industrial Classification (SIC) and Standard Occupational Classification (SOC) codes identified in the DET. Note these categories are being reviewed by DCMS and ONS. According to this definition, the cultural sector comprises the following seven sub-sectors or domains:

- Audio-Visual (includes film, TV, radio, new media and music)
- Books and Press
- Heritage (includes museums, libraries, archives and historic environment)

3 DCMS (2007) *Taking Part The National Survey of Culture, Leisure and Sport Annual Report 2005/2006*

4 Data Evidence Toolkit (DET) is an online interactive web based toolkit for accessing and using information about the cultural sector. It does not impose a 'one size fits all' model for the development and use of statistics see (see DCMS www.culture.gov.uk)

- Performance (includes theatre, arts and dance)
- Sport (includes fitness and health activities)
- Tourism (includes gambling and betting activities)
- Visual Arts (includes galleries, architecture, design and crafts)

11.3.2 This chapter examines statistical data for cultural activity in the South West and the impact culture has on the region's profile and economic capacity, and on broader social factors such as community cohesion and social inclusion.

11.3.3 When dealing statistically with the cultural sector in any region, caution is necessary because of the relative lack of robust and comprehensive data across the domains. This problem is not unique to the cultural sector but is exacerbated by a large freelance workforce and predominance of small and micro sized businesses which are unlikely to be VAT registered and therefore not counted in official statistics.

11.3.4 A new regional cultural strategy, 'A Better Place to Be' was published by Culture South West in 2008. It sets out the twenty year vision and Framework for Action for cross-cultural development, including; the key governance areas of cultural service improvement; London 2012 Olympic Games and Paralympic Games; the Creative Economy and place-shaping.

11.3.5 Culture South West will be closing on 31 March 2009. This follows a review of regional cultural arrangements by DCMS. From 1 April 2009, Arts Council England, Sport England, English Heritage and the Museums, Libraries and Archives Council in the South West will be responsible to DCMS for a regional action plan for cross cultural sector work that includes research, building on the strong partnerships that already exist in the region.

11.4 Regional Trends

11.4.1 Regional Trends is published by the Office for National Statistics and exists to paint a statistical picture of regional areas within the UK to assist in understanding the complex relationships between locations and the people who live there. Understanding the differences between regions and differences within our own region is vital to development of sound policies.

Links are provided to the relevant ONS pages and to the specific data sets relevant to this chapter for download . Whilst the focus is on English regions data is also supplied for Wales, Scotland and Northern Ireland to give a broader comparison.

11.4.2 [Income and Lifestyles](#)

11.4.3 [Regional Profiles](#)

11.4.4 [ONS main page for Regional Trends](#)

11.5 Cultural and Regional Identity

11.5.1 The impact of culture on the life of the region extends beyond the economic benefits in terms of business activity and visitor numbers. The region gains a distinctive identity from the range of cultural assets and resources, from visual arts and crafts to theatrical and musical performance, film and digital media to archives and museums, from sporting activities to the historic, natural and built environments.

11.5.2 The region's cultural identity, assets and resources are increasingly central to the profile of the South West and to the achievement of the policy objective to become a knowledge-based economy. Creativity, intellectual property and the range and quality of amenities play a crucial role in defining and shaping the South West's competitive advantage and its national and international standing, (SWRDA May 2006). Employers and employees in knowledge-based industries are known to be drawn to areas where there is a rich, diverse and thriving cultural and creative environment. Given the region's existing producers of creative and innovative ideas and those emerging from the 14 higher education institutions, the region is well-placed to fulfil this ambition.

11.5.3 It is important to recognise the cultural diversity of the South West population because of its significance to the expression of cultural activities throughout the region. Although people from Black and minority ethnic (BME) groups make up only 3.5% of the total population, the lowest in England, this statistic under-estimates the breadth of cultural life, (ONS 2004). Census categories of 'White Other' and 'Other' hide distinctive cultural backgrounds and ways of life of, for example, individuals from Italian and Eastern European backgrounds. Cultural diversity is also evident in the region's different religious and local communities, (Reeves 2006).

11.6 Economics of Cultural Activity

11.6.1 The economic contribution of cultural activity to the South West can be counted in terms of business turnover, employment rates, and spend. The relatively high amount spent both by households on 'recreation and culture' compared to other items and by visitors to the region indicates that culture is a significant contributor to the economic health of the South West on the demand side.

11.6.2 On the supply side, growth in turnover by businesses in the cultural sector is a positive indicator of economic well-being with a 29% increase in sector turnover on current prices between 1998 and 2005, (ONS 2006). According to latest Inter-Departmental Business Register (IDBR: 2007) figures, there were 29,900 businesses registered, employing 183,475 people and generating turnover of £10.6 billion.

11.6.1 Cultural Businesses

11.6.1.1 Cultural businesses are those operating in a sector that comprises the following seven sub-sectors or domains as described in DCMS's Data Evidence Toolkit: Audio-Visual; Books and Press; Heritage; Performance Arts; Sport; Tourism and Visual Arts. They are predominantly small and micro sized enterprises, many of which are non-VAT registered

i.e. statistically 'invisible', self-employed and sole traders. There are a range of business models applied in the cultural sector from public sector organisations through social enterprises to those in the commercial private sector.

11.6.1.2 Creative industries, an industrially classified grouping within the broad cultural sector, is prioritised in the current Regional Economic Strategy (RES) and interventions detailed in a new strategic plan, 'Creative Industry Strategy: Unlocking the creative business potential of the South West' published by SWRDA. Furthermore, the region's competitive strengths in creativity and digital content production are recognised in the Department for Culture Media and Sport (DCMS) strategy 'Creative Britain: New Talents for the New Economy' and announcement of South West England as a pilot site for the Creative Economy Programme.

11.6.1.3 In terms of statistical measurement, the influential 'Staying Ahead: The Economic Performance of the UK Creative Industries' report by Work Foundation, heralds a change in methodology from of classification towards one of production value segmentation. Bearing in mind this shift, statistical counts for the region's creative industries are currently quoted as:

- revenues of £5.54 billion (2001)
- GVA of £1.847 billion (2001), contributing 8% to the national economy
- employment of 144,000 made up of 89,000 in core creative industries plus an additional 55,000 in other indirect creative occupations

11.6.1.4 'People, Places and Spaces: a cultural infrastructure development strategy for the South West of England', published by Culture South West, was launched alongside the regional cultural strategy and, in terms of housing and amenities, complements the 'Draft Revised Regional Spatial Strategy for the South West'.

11.6.2 Businesses, Employment and Turnover

11.6.2.1 Data in the following section are taken from a bespoke analysis undertaken by ONS using the Inter-departmental Business Register (IDBR) for Culture South West, (ONS 2006). In 2005 there were 25,520 business entities in the DET-defined cultural sector, employing 176,005 people and with a turnover of £10.9 billion.

Table 11.1 Total Number of Businesses, Employment and Turnover by Cultural Domains in the South West and England, 1998-2005

Sub-sector	IDBR (1998)		IDBR (2005)	
	South West	England	South West	England
Visual Arts				
Count	5,460	52,735	6,540	58,010
Employees	13,120	141,295	19,565	187,090
Turnover	1,080,470	12,810,930	1,673,675	18,795,530
Performance				
Count	630	8,465	670	8,955
Employees	1,920	31,555	2,695	37,950
Turnover	114,800	2,581,720	166,165	3,665,330
Audio-Visual				
Count	7,825	93,545	7,350	87,830
Employees	40,000	601,860	39,385	719,080
Turnover	3,017,790	82,481,465	3,348,915	118,664,720
Books and Press				
Count	3,680	36,620	3,285	31,105
Employees	24,365	374,170	22,290	382,370
Turnover	1,823,790	34,278,315	1,940,345	38,002,285
Heritage				
Count	125	785	140	910
Employees	9,740	25,730	11,370	37,895
Turnover	171,090	592,080	215,325	1,117,665
Sport				
Count	1,920	15,905	2,290	17,855
Employees	17,200	173,530	28,260	325,690
Turnover	525,620	7,836,440	1,201,910	17,003,945
Tourism				
Count	5,125	35,115	5,245	37,450
Employees	48,315	584,520	52,440	750,565
Turnover	1,758,580	41,937,550	2,438,515	75,077,175
Total				
Count	24,760	243,170	25,520	242,115
Employees	154,665	1,932,665	176,005	2,402,690
Turnover	8,492,145	182,518,495	10,984,850	272,326,650

Source: Office for National Statistics (2006) Statistical Count of Cultural Sector 1998-2005 Using Inter-Departmental Business Register Culture South West, Exeter

11.6.2.2 The employment count represents the number of people working in cultural and creative businesses in the South West as identified in the DET. These figures will therefore include the employment of people in non-cultural occupations such as administration and finance. They do not include non-VAT registered businesses and many other statistically 'invisible' workers in self-employed, freelance and intermittent worker categories.

11.6.2.3 The Labour Force Survey (LFS) provides estimates of the number of South West residents who work in cultural occupations. In 2005, the LFS found that 10% of those working in one of 48 occupations classified as 'cultural' by the DET in England were located in the South West. Of the 179,564 employed in the cultural occupations, around 60,000 were self-employed, an important component of the cultural workforce.

11.6.3 Economic Growth

11.6.3.1 Between 1998 and 2005 the number of cultural sector businesses increased by 3%, employment increased by 14% and turnover increased by 29%, (ONS 2006). A large proportion of the increased turnover may simply be the result of inflation. By contrast, for the same period in England, the number of cultural businesses increased slightly by 0.4%, employment increased by 24% and turnover increased by 49%. The growth and decline rates for business count, employment and turnover for each of the seven cultural domains are shown below.

Table 11.2 Total Number of Businesses, Employment and Turnover by Cultural Domains in the South West and England 1998-2005

	Business Count	Employees	Turnover	Business Count	Employees	Turnover
1998	South West			England		
Visual Arts	5,460	13,120	1,080,470	52,735	141,295	12,810,930
Performance	630	1,920	114,800	8,465	31,555	2,581,720
Audio-Visual	7,825	40,000	3,017,790	93,545	601,860	82,481,465
Books and Press	3,680	24,365	1,823,790	36,620	374,170	34,278,315
Heritage	125	9,740	171,090	785	25,730	592,080
Sport	1,920	17,200	525,620	15,905	173,530	7,836
Tourism	5,125	48,315	1,758,580	35,115	584,520	41,937,550
Total	24,760	154,665	8,492,145	243,170	1,932,665	182,518,495
2005						
Visual Arts	6,540	19,565	1,673,675	58,010	186,090	18,795,530
Performance	670	2,695	166,165	8,955	37,950	3,665,330
Audio-Visual	7,350	39,385	3,348,915	87,830	719,080	118,664,720
Books and Press	3,285	22,290	1,940,345	31,105	382,370	38,002,285
Heritage	140	11,370	215,325	910	37,895	1,117,665
Sport	2,290	28,260	1,201,910	17,855	325,690	17,003,945
Tourism	5,245	52,440	2,438,515	37,450	750,565	75,077,175
Total	25,520	176,005	10,984,850	242,115	2,402,690	272,326,650
Source: ONS 2006						

11.6.4 The Creative Economy

11.6.4.1 Creative industries, as an industrial grouping within the cultural sector, is a priority sector for SW RDA and many local and unitary authorities because of its strong economic performance, high levels of GVA and link to tourism. The South West is one of only two English regions to be selected to pilot the new Creative Economy Programme launched by DCMS in February 2008.

11.6.4.2 Creative industries are defined by DCMS as the audio-visual industries plus books and press, performance and visual arts domains which embrace those industries that are based on individual creativity, skill and talent. They are also those that have the potential to create wealth and jobs through developing intellectual property. They are largely commercial businesses as distinct from the many publicly-subsidised entities such as libraries and museums in the wider cultural sector.

11.6.4.3 While research of the creative industries is subject to much debate and statistics vary according to which definition and statistical analysis are applied, the Regional Accounts show the creative industries sector counts of:

- revenues of £5,54 billion (2001)
- GVA £1.847 billion (2001), contributing 8% to the national economy and almost 4% of total regional Gross Value Added (GVA) on 2002 figures
- employment of 144,000 with growth of 8.2% between 2000 and 2004, a workforce made up of 89,000 jobs in the sector plus an additional 55,000 in other related creative occupations.
- significance of the digital content media sub-sector because of its high value output and export potential and contribution to the region's ambition for a knowledge-based economy and emphasis on creativity and innovation
- data suggests some growth of business size - although micro-enterprises (fewer than 10 employees) accounted for only 32.5% of employment in 2001, small enterprises (10-49 employees) increased their share of employment over the period 1998-2001 from 24.2% to 26.6%; 26% of businesses in this sector have been established in the period 1999 to 2004 with sub-regional variations i.e. 31% of enterprises in Devon & Cornwall have been established over the last five years compared with 23% in West of England.

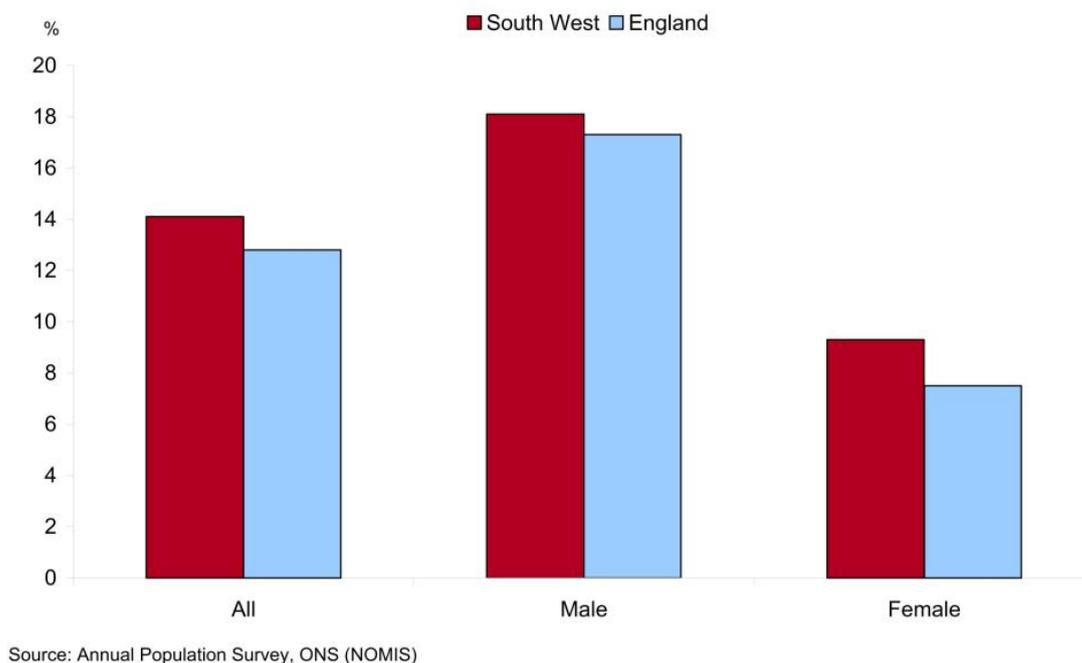
11.6.5 Household Expenditure on Culture

11.6.5.1 According to latest available ONS statistics on Regional Household Spend, 'recreation and culture' remains the second highest category of average weekly household spend after transport. Between 2004/05 and 2006/7, the South West regional overall average weekly spend was £459.40 (UK average = £454.10) of which £62.20 was spent on 'recreation and culture' (UK average = £57.50). Regional household spend on 'recreation and culture' (which includes computers and holidays) has therefore risen by 6.3% since the period 2002/3 - 2004/5 (£58.50 a week).

11.6.5.2 'Recreation and culture' is the second highest expenditure category for households in the region after transport, (ONS 2006). The significance of the cultural sector to the local economy is further illustrated by the fact that the average south west household spends over two and a half times more on 'recreation and culture' than on clothing and footwear.

11.6.5.3 In England 'recreation and culture' (formerly defined as 'leisure goods and leisure services') is the second largest single item of family expenditure accounting for 14% of total expenditure. Households in the South West spent more on 'leisure goods and services' than essential items such as food and non-alcoholic drinks and housing during 2002/03 - 2004/05. Figure 11.3 below shows how the 'recreation and culture' spend in the South West is distributed, (ONS 2006).

Figure 11.1 Expenditure on Recreation and Culture in the South West 2002/03 - 2004/05, £



11.6.6 Tourism Expenditure

11.6.6.1 The economic contribution of the cultural sector includes the spending of people who visit the region as domestic and inbound tourists. Tourism is a major industry in the South West, accounting for around 15% of UK domestic tourist visits and 9.6% of inbound ones to the UK. In 2005 the South West attracted 21.25 million domestic visitors from the UK (UK Tourism Survey) and 2.1 million visitors from overseas, (International Passenger Survey).

11.6.6.2 Tourism is a key economic driver in the South West and forms an important part of the region's cultural sector. According to latest UK Tourism Survey 2007, findings, the South West share of national domestic tourist trips remained stable at approximately 15% of the UK total since 2001 (UK and the region remained the UK's number one holiday destination for domestic visitors. However, over recent years there has been a slight decline of approximately 4% in the number of domestic visitors to the region, with 21.25 million trips made in 2005 compared to 20.46 million trips made in 2007. By contrast, there has been a 5% increase in trips from overseas visitors with 2.14 million trips made in 2005 compared to 2.25 million trips in 2007 (International Passenger Survey). Of reasons given by domestic visitors for choosing the South West, 71% gave 'holiday' and 11% 'business and work'. According to the UK Tourism Survey and International Passenger Survey, domestic visitors contributed, in 2007, an estimated £3.8 billion in expenditure to the region's economy and inbound visitors contributed £840 million.

11.6.6.3 SW Tourism's 2007 Visitor Survey found, The Eden Project in Cornwall remained top of the region's most popular paid attraction list with 1.1m visitors, and Ashton Gate in Bristol as the most visited attraction in the South West (1.7m visitors). Of participation in activities, the most popular was 'going shopping' (73%), 'going for short walks' (70%), 'visiting heritage sites (42%), going for long walks (36%), 'visiting museums and art galleries (26%).

11.6.6.4 Of the reasons given for visiting the South West in 2005, 11.7 million (56%) were recorded under holiday / leisure/ pleasure. According to Visit Britain, visiting an historical site or heritage exhibit during 2003 motivated "in part, an estimated 8.3 million trips by domestic staying visitors", that is 36% of all trips.

Table 11.3 Visitor Numbers at South West Sites 2004

Site	Visitor Numbers
Eden Project	1,200,000
Roman Baths Museum, Bath	867,724
Stonehenge	802,811
Moors Valley Country Park	770,000 ¹
Longleat Estate	692,129
Dart Pleasure Craft Limited	676,973
Avon Heath Country Park	550,000 ²
Paignton Zoo	486,728
Tamar Cruising	400,000
Stourhead House	335,265
Cornish Cyder Farm	330,000 ³
Crickley Hill Country Park	314,963
Gloucester Cathedral	313,732
Wells Cathedral	300,000
¹ [estimate based on previous year's confirmed figure of 750,000]	
² [estimate based on previous year's confirmed figure of 600,000]	
³ [estimate based on previous year's confirmed figure of 340,000]	
Source: Visits to Visitor Attractions, Visit Britain, 2005	

11.6.6.5 According to the UK Tourism Survey and International Passenger Survey, domestic visitors contributed, in 2005, an estimated £3.8 billion in expenditure to the region's economy and inbound visitors contributed £868 million. Direct comparison between 2003 and 2005 data is not possible due to different methodologies but there are some indicative trends. Although the number of all visitors to the region has declined by nearly 6.8% since 2003, there has been only a 4.4% decrease in tourist spend (from £4.9 billion to £4.7 billion).

11.6.6.6 Breakdown of expenditure in 2003 by category for domestic visitors coming to the South West was, reported by South West Tourism, as follows:

- Package trip: £190 million
- Accommodation (non package trip): £1.4 billion
- Travel: £650 million
- Services or advice: £80 million
- Buying clothes: £270 million
- Eating and drinking: £910 million
- Other shopping: £250 million
- Entertainment: £400 million
- Other expenses: £130 million

11.7 Cultural Assets

11.7.1 The South West region is rich in cultural assets and resources which together form an impressive infrastructure for local residents, students and visitors alike. Existing provision includes major built and natural heritage sites, music and film festivals, museums and galleries, sports facilities and events. This infrastructure is crucial to the South West's engagement with the creative and knowledge based economy, as well as providing a solid resource base for sustainable tourism. Public consultation on a cultural spatial strategy for the South West, *People, Places and Spaces: The Joint Cultural Infrastructure Development Strategy* will be published in spring 2008 (Culture South West <http://www.culturesouthwest.org.uk>) and links closely to the Regional Economic Strategy (May 2006) and Draft Regional Spatial Strategy (South West Regional Assembly, 2006). The strategy sets out a plan for developing cultural infrastructure over the next 20 years, highlighting the initial cross-cultural regional priorities and basis for identifying sub regional ones within Planning Areas for Culture.

11.7.1 Museums, Galleries, Libraries and Archives

11.7.1.1 There are almost 2,000 museums, galleries, libraries and archives in the South West serving a wide range of constituencies and specialist interest groups. They form an important knowledge base for the region with local nodes and points of presence in almost every community. Museums in the South West have benefitted from £23.8 million of funding from the Museums, Libraries and Archives (MLA) Council's Renaissance programme, since 2002. Investment has been focused on five 'Hub' museums in Bristol, Bournemouth, Exeter, Plymouth and Truro, and transformational change has been achieved in these key regional museums. Renaissance also funds work in other museums, through partnerships with MLA South West, providing grant funding, skills sharing, workforce development training and support from a network of Museum Development Officers. A further three years of investment has been secured for Renaissance in the South West, from 2008, but spending will be reduced as the region (which was one of three 'Phase One' Hubs that received extra funding) is brought into line with the rest of England.

11.7.1.2 Museums, libraries and archives have been used as centrepieces for urban and rural regeneration, bringing the community together to support the new projects. Examples of this include the Wiltshire and Swindon History Centre, in Chippenham (opened 2007) and two major capital investment projects, supported by MLA's Renaissance: the development of the new Museum of Bristol (due to open in 2010 at a cost of £24.8 million) and the extension and refurbishment of Exeter's Royal Albert Memorial Museum (a £15 million project, to be completed by 2010.)

The South West is the only English region chosen for inclusion in the new Living Places initiative, spearheaded by MLA Council, in partnership with CLG, DCMS, CABE, Sport England, Arts Council England and the eight Regional Cultural Consortia. Other 'Living Places' priority areas cover smaller geographical areas, for example Corby and The Thames Gateway. The project aims to ensure that all communities, particularly those experiencing housing-led growth and regeneration, can benefit from cultural and sporting opportunities. Living Places is designed to raise awareness that culture and sport can deliver a wide array

of benefits for society, and help solve a broad range of policy problems (www.living-places.org.uk). MLA South West is the South West regional lead agency for the Living Places priority place.

11.7.2 Sport

11.7.2.1 According to a report for Sport England by Cambridge Econometrics (2003), sports facilities and venues in the South West encourage 575,000 people per annum to participate in sports. People in the South West spend more money on active participation in sport than attendance at sporting events or viewing sports on screen media. High profile sports activities attract over 1 million people and nearly £90 million into the region from elsewhere.

11.7.2.2 The South West is home to 36 major sporting venues with professional rugby, football and county cricket in towns and cities throughout the region. Regionally, more than £185 million has been invested in sport since 1996 including University of Bath's Team Bath initiative and the National Sailing Academy In Weymouth and Portland. Future multi-million pound new builds are planned in Bristol and Plymouth to enhance the region's sporting offer of excellence and visitor attractions.

11.7.2.3 An indication of how much local people value their cultural assets is given in an Arts Council England report which found South West respondents were most likely, along with London and the South East (all 67%) to agree that "if my local area lost its arts and cultural activities, the people living here would lose something of value"; and Sport England *Active People Survey* which shows 70.5% of South West adults (aged 16+) are satisfied with the sports provision in their local area, just above the national figure of 69.5%, (ONS 2004 and ipsos MORI 2006).

11.7.2.4 Given the projected increase of population for the South West over the next 20 years, the popularity of 'recreation and culture', and the contribution of culture to the regional economy, culture may be expected to rise in economic importance in the region. Festivals and events will be a central focus of future planning to further generate wealth, attract tourists and enhance the regional identity. There is an immediate opportunity for the South West through the 2012 London Olympic and Paralympic Games and in the proposed Cultural Olympiad from 2008.

11.7.3 Built and Natural Heritage

11.7.3.1 Of the 350,000 records of monuments and archaeological sites on the English Heritage Past Heritage database for England, 22% of the total (76,589) are in the South West. The region also has 35% of all scheduled monuments in England and hosts 24% of the national List of Buildings of Special Architectural or Historical Interest. The National Trust open 83 historic houses and gardens in the South West and English Heritage open over 100 sites, including Stonehenge and Tintagel Castle.

11.7.3.2 The region's outstanding natural heritage assets include the Cotswolds, Mendips, Quantocks, the National Parks of Dartmoor and Exmoor, and coastlines of Dorset and Cornwall. There are 4 UNESCO World Heritage Sites within the South West: Stonehenge, Avebury and Associated Sites; the City of Bath; Dorset and East Devon Coast (the Jurassic Coast); and the Cornwall and West Devon Mining Landscape.

11.7.4 Festivals

11.7.4.1 The South West is host to a range of international festivals including Bath International Music Festival, Cheltenham Festival, Encounters International Short Film Festival, Wildscreen Natural History Film Festival, and Glastonbury Festival which alone attracts over 100,000 people to one of the world's largest popular music festivals. Local but equally distinctive festivals involve hundreds of thousands of residents and visitors such as the 'Obby 'Oss Festival in Padstow, St Paul's Carnival in Bristol and Cheese Rolling Festival at Coopers Hill in Gloucestershire.

11.7.5 Funding in the Cultural Sector

11.7.5.1 Between 2001 and 2004, the South West was granted the fifth highest level of Lottery funding for cultural activities of the nine English regions, receiving £198 million compared to the national average (excluding London) of £183 million, (Kinghurst 2004). The South West also received £105 million of government funds for cultural activities, the third highest level of funding after London and the South East. Lottery funds which are allocated according to the Index of Multiple Deprivation (IMD), place the South West above the national average. However, if IMD is used to allocate national and local government funds for cultural activities in the South West, this will have a detrimental effect on provision in future years. The region has the lowest proportion of the most deprived Super Output Areas (SOA) in England with only 4% as defined by the IMD. In addition, trends in local authority spending show, according to *Local Authorities; A Change in Cultural Climate*, (Holden 2006), cultural services are a vulnerable area for cutback because of their non-statutory status.

11.8 Culture and Society

11.8.1 There is evidence to suggest that the extent to which people invest and participate in cultural activity influences both cultural and social well-being. Apart from the economic benefits of such activity, culture also supports, for example, the region's sense of identity, community, place, quality of life and citizenship. Attendance and participation rates for various cultural activities in the South West indicate a positive state of health but with some socio-geographical variations. Evidence of rates and trends is provided in studies for Arts Council England, (Arts Council England 2006) and the major DCMS-led national surveys, namely DCMS *Taking Part: A National Survey* and Sport England *Active People*.

11.8.2 A report for Culture South West demonstrates the importance of cultural activity in the lives of older people and the contribution, in turn, of older people to a vibrant and diverse cultural sector, (Hennessy and Giarchi 2006). Cultural activities such as hobbies, sports, religion and volunteerism are shown to promote health and well-being in later life and to generate social capital. The report articulates the impact of the region's demographic ageing on age-specific development of cultural products and services.

11.8.3 The connection between culture, social well-being and place-shaping is evidenced in 'A Better Place to Be' and 'People, Places and Spaces' and promoted by new cultural development partnerships in growth areas across the South West England. Trends in social and cultural demographic variations in participation and attendance rates remain low for people from disadvantage groups including those from minority ethnic backgrounds and lower socio-economic groups, and those with disabilities.

11.8.4 Although the region's population as a whole invests heavily in cultural activities, there are variations in participation and attendance rates depending on age, socio-economic status and geographic location. According to *Arts in England 2003: Attendance, Participation and Attitudes*, people aged 55 to 64 had the highest levels of attendance of all age groups at musicals, craft exhibitions, visual arts exhibitions, classical music and opera but arts attendance declines with age across all activities.

11.8.5 Lower rates are consistently found for people from disadvantaged groups according to findings from DCMS *Taking Part Survey*. For example, 47% of adults from Black and minority ethnic (BME) backgrounds, 58% of adults with a limiting disability⁽⁵⁾ and 57% of adults from lower socio-economic groups visited at least one type of designated historic environment site in the last 12 months compared to the national average of 70%. Again, compared to the national average of 43% for at least one visit to a museum in the last year, 36% of adults from BME backgrounds, 32% of adults with a limiting disability and 29% of adults from lower socio-economic groups, made such a visit.

11.8.1 Attendance and Participation in Cultural Activities

11.8.1.1 Culture is not just about economic issues. It also supports a region's sense of identity, community, place, quality of life and citizenship. Participation rates and access to cultural facilities in various cultural activities provide some indicators of the health of the region.

11.8.2 Artistic and Performance Events

11.8.2.1 Arts Council England report *Arts in England 2003* found 84% of people aged 16+ in the South West were most likely to have attended at least one artistic and cultural event in 2003. The region's participation and attendance rates were consistently high across a range of cultural activities with top rating for attendance at carnivals.

Film and Cinema

11.8.2.2 Click here for information on [film and cinema statistics](#)

5 Disability is defined in terms of: 'do you have a longstanding illness, disability or infirmity? By longstanding I mean anything that has troubled you over a long period of time or that is likely to affect you over a period of time.'

11.8.3 Museums, Libraries and Archives

In 2006, in the South West, museums and galleries had an estimated 12.5 million visitors and generated in excess of £56 million in income. In addition to tourist visitors nearly 250,000 local residents visited archives, 2 million local residents visited museums and 27.5 million library visits by local residents were recorded during 2006/7. DCMS's 'Taking Part' survey (Taking Part: The National Survey of Culture, Leisure and Sport, 2007) shows that 39.9% of adults in the South West visited museums during 2006-07 (slightly below the national average: 42%). 47.9% of adults used libraries (national average: 48%) and 5.7% visited archives (national average: 6%.)

11.8.3.1 The museum sector alone contributes 25% of all Heritage Tourism visitors which equates to 10.5 million visitors to the South West museums per annum (Locum Destination Review 2:2000). The libraries in Exeter, Plymouth and Taunton are among the top 20 busiest in England (CIPFA Public Library Actuals Survey 2006-07).

11.8.4 Sport

11.8.4.1 Participation and attendance rates for cultural and sporting activities are measured in national surveys and used to assess cultural Key Performance Indicators (KPI). Active People Survey 2, commissioned by Sport England, reported findings in 2008 including headline participation rates for the South West

11.8.4.2 Findings show:

- 22.5% of the adult population (957,600) undertake 3x30 minute sport and active recreation, which is above the national figure of 21.3% and a slight increase on Active People Survey 1 (21.9%)
- local variations in participation rates range from 30.6% in Kennet to 18.9% in Gloucester and 17.7% in Kerrier
- 68.5% of the adult population (2,917,500) are fairly or very satisfied with sports provision in their local area (compared to 66.6% nationally) but satisfaction rates have decreased by 2.0 percentage points in the region when compared with Active People Survey 1, varying from 77.5% in Exeter to 51.9% in West Somerset

11.8.5 Volunteering in the Cultural Sector

11.8.5.1 According to the Citizenship Survey published in 2003 by the Home Office, the South West has the highest participation rates for all forms of volunteering activity of the English regions. This may in part be due to the region's demographic ageing trend, older people being more likely to be engaged in volunteering. Sport England *Active People Survey* findings show an above average rate for the South West (5.2%) of volunteering in sport compared to the national average of 4.7%.

11.8.5.2 In 2006 6,800 individuals volunteered within the South West's museums, libraries and archives (DCMS 'A Giving Culture' 2006). Despite the ever increasing ageing population peculiar to our region, 48% of volunteers within the South West region were under the age of 65 years old according to research in 2005 (The Institute for Volunteering Research 2005).

11.8.5.3 Although there is a paucity of research data on volunteering in the cultural sector, a recent report, Resolve Consulting 2006, found 86% of volunteers in the South West are aged 55+ compared to 72% nationally. The South West has the highest percentage of disabled people (12%) volunteering, compared to 9% nationally.

11.8.6 Culture and Social Inclusion

11.8.6.1 It is clear that there are significant variations in participation rates according to socio-economic status. Opportunity for access to cultural activities does vary according to social class and income, and consideration needs to be given to issues of affordability and the physical and intellectual accessibility of cultural events and facilities. Evidence of need has led to Government's announcement of the 'Cultural Offer' challenge aimed at improving cultural participation by children and young people which will be measured through the *Taking Part Survey* and, for adults in the South West, the region's status as a pilot for the 'Living Places' initiative will be measured for impact.

11.9 Climate Change

11.9.1 There is growing awareness by professionals working in the UK cultural sector, notably those in heritage and tourism, of the impacts of climate change on cultural assets and visitor numbers. Findings and recommendations from recent studies are equally applicable to the South West where heritage and tourism make significant contributions to economic and cultural sustainability.

11.9.2 Firstly, research by a national partnership including The National Trust and English Heritage, highlights the susceptibility of historic environments to changes in, for example, rainfall and temperature and the need for indicators of climate change impact at national, regional and local levels, (Cassar 2005). Secondly, a report commissioned by Sustainability North West in 2006, highlights the positive and negative impacts of climate change including higher temperatures on visitor numbers and cultural attractions stating, "Man made attractions will always be more easily adapted to ensure the quality of the visitor experience but the natural landscape is not so able to respond as quickly or adequately", (McEvoy 2006).

11.9.3 Research into the contribution cultural and creative industries make to climate change is lacking at a regional level but will be a focus of Sustainability South West and Culture South West work in 2007.

11.10 Conclusion

11.10.1 Culture is all-pervasive and should not, and cannot, be separated from the wider life of the region. As an economic industrial sector, cultural businesses generate wealth for the South West and, through a range of activities delivered through the seven cultural domains,

contributes to a perceived good quality of life and positive regional image. Culture is also an intrinsic component of everyday life – closely associated with skills and learning, planning, public health and sustainable environments.