

11 Culture

11.1 Key Themes

11.1.1 Of the UK's culture and sport economy, activity in South West England makes a strong contribution, and particularly that of the digital and creative industries, and cultural heritage. According to the Department for Culture, Media and Sport's Culture and Sport Evidence (CASE) research, the creative sector in South West England continues to generate the highest economic values of the four industrial categories (creative, heritage, museums libraries and archives, and sport). There are significant concentrations of creative activity in the Growth Hubs of Bristol and Bath, that are associated with high-growth business clusters, innovation and creativity.

11.1.2 Tourism is inter-connected to the region's diverse cultural and creative life, attracting significant numbers of domestic and overseas visitors. The most popular tourist destination in the UK, the South West specialises in the domestic holiday market. In spite of global recession and wet weather, all visitor numbers and spend have increased, with tourist businesses generating an estimated 9% to the region's economic outputs

11.1.3 Public engagement in culture and sport, including volunteering, is a strategic objective of Department for Culture, Media and Sport (DCMS) and its sponsored cultural agencies, as well as that of many local authorities across the South West. Of progress towards higher levels of participation and attendance, evidence shows little or no change, but modest success when compared to other regions. Results from Sport England's Active People Survey 4 (2009/10) reveal higher than average rates of participation by adults in moderate intensity sport and active recreation, volunteering and satisfaction with sports facilities. While visits to libraries, museums and galleries have decreased, participation rates in the arts have remained unchanged. Most encouraging is the steady increase of admissions to cinemas in the South West.

11.1.4 Household spend on 'recreation and culture' is the second highest in South West England of all nine English regions, with an average weekly spend of £63.60 and compared to the UK average of £58.30 (ONS, November 2010). 'Nationally, 'prosperous young families'

and a 'village life' group within the 'countryside supergroup are the highest spenders on 'recreation and culture'. Of this expenditure, approximately a third was spent on recreational and cultural services (sports admissions, leisure class fees and equipment hire; cinema, theatre and museums; TV, video, satellite rental, cable subscriptions, TV licenses and internet; and gambling payments).

11.1.5 According to English Heritage's annual survey, Heritage Counts 2010, 69.8% of adults participated in the historic environment (of two or more visits in the past 12 months). This is lower than in 2008/09 (72.7%) and below the 2009/10 England average rate of 70.4%. Although English Heritage and National Trust experienced 3% and 2% declines (respectively) in visitor numbers between 2007/08 and 2008/09, figures for 2009/10 show signs of recovery – and visitor numbers at many historic sites are the highest since 2001/02. National Trust Visitor numbers in the South West increased by 15% between 2008/09 and 2009/10; English Heritage Visitor numbers increased by 5.6% over the same time period.

11.1.6 Cultural infrastructure development was the subject of a ground-breaking spatial planning strategy, *People, Places and Spaces* (Culture South West, September 2008a). The document supports the region's wealth of existing culture and sport assets, while looking ahead to future needs. With ancient and modern icons located in the region and an estimated 26,600 physical assets, including four World Heritage Sites, and the national parks of Dartmoor and Exmoor, the South West has much to offer residents and visitors. Population and housing growth are, nonetheless, driving demand for more local culture and sport facilities, and particularly in growth points including Swindon, Bournemouth, Poole, Exeter and Plymouth. Strategic local cultural partnerships, of public and private organisations, are working with urban regeneration companies and developers to ensure cultural and sporting provision is an integral part of new construction projects.

11.1.7 Governance of public cultural policy development and delivery, and corresponding decision-making structures and processes, are important components of a region's cultural profile. Following the General Election of May 2010 and Comprehensive Spending Review announcements, structural arrangements at national, regional and local scales, are

under-going radical change – including the abolition of Centre for Architecture and the Built Environment (CABE), Museums Libraries and Archives Council (MLA) and UK Film Council, and reviews by local authorities of cultural services. Nationally, the Department for Culture, Media and Sport (DCMS) continues to lead on cultural and sporting policy, sharing responsibilities with other governmental departments on areas such as economic development, local government reform and Big Society agenda. Two significant regional cultural partnerships were set up in 2009: the South West Culture Board of representatives from four DCMS sponsored cultural agencies (Arts Council England, English Heritage, Museums Libraries and Archives Council and Sport England); and South West Local Authority Cultural Partnership. At a local level, strategic and innovative delivery mechanisms, for the delivery of cultural and business support services, are emerging. Bearing in mind the challenges and opportunities posed by recent political change, fiscal constraint and global economic recovery, the state of culture in South West England is relatively healthy.

11.2 Key Data

11.2.1 Headline data on the state of culture in South West England include:

- a 1% decrease of culture and sport employment, between 2006 and 2008, from 190,112 to 188,856, one of the lowest changes of all English regions outside of London and the South East (where employment increased);
- a 17% increase of VAT-registered culture and sport businesses, between 2007 and 2009 from 13,221 to 15,491, with the highest increase in creative businesses at 18%;
- an estimated 13,086 VAT-registered businesses in the creative sector, with employment of 137,848, and a 7% increase in GVA between 2005/6 and 2007/8 [this data do not include those working in creative occupations outside of the 'core' creative sector];
- private investment in the South West increased by 25% between 2007/08 and 2009/10, compared to an overall GB decrease of 3%;
- an estimated 118,014,000 domestic and international visitors in 2008, generating a spend of £9.4 billion. Cultural heritage and

the region's tourist industry are inter-connected. In 2008 the total number of trips was 118 million (staying trips: 21.2 millions; day trips: 96.8 million) with a total visitor related spend of £9.4 billion (South West Tourism May 2010);

- an average weekly household spend on 'recreation and culture' of £63.60, compared to the UK average of £58.30;
- an adult participation rate of 23.2% in sport and active recreation in the South West, in at least 30 minutes of moderate intensity sport and active recreation on 3 or more days in a week (KPI 1), that is the highest rate of all English regions, and compares to the national average of 21.8%;
- an above average rate of volunteering in sports activities (KPI 2) of 5.3% (compared to the England rate of 4.5%), and an increased level of satisfaction with sports facilities from 69.6% (2008) to 71.9% (2010);
- a decrease in visits by adults to libraries, with rates falling from 47.8% in 2008 to 44% in 2010 (compared to an England average decrease from 48.5% to 45% in the same period);
- a decrease in visits by adults to museums and galleries between 2008 and 2010 from 52.9% to 51.4%, but with variations across local authorities - for example, no change in Bristol (61.4%) and Bath and North East Somerset (59.6%), an increase to 59.1% in Exeter, and a 4.3% decrease to 46.5% in Taunton Deane;
- an unchanged rate of engagement in the arts at 47.6% in the South West, compared to slight decreases in most other regions, and to an England average rate of 43.8%;
- a decrease in adult participation in the historic environment from a rate of 72.7% in 2008/09 to 69.8% in 2009/10, with even lower rates for Black and Minority Ethnic groups (from 67.9% to 60.5%), and for lower socio-economic groups (from 62.2% to 54.7%);
- a 3% fall in visits to English Heritage sites and fall of 2% to National Trust sites, between 2005/06 and 2007/08, although recent figures show admissions are again rising;
- an increase of admissions to cinemas in the South West from 3.9 million in 2008 to 4.3 million in 2009; with a regional 'cinema deprivation' rate of 6.1 screens per 100,000 of the population compared to the national

- average of 5.9 – albeit with significant variations across local authority areas;
- a total of 26,600 culture and sport physical assets counted across the South West;
- the highest proportion of England’s historic built assets, with 6,968 scheduled monuments (a third of England’s total), 88,676 listed buildings, 4 World Heritage Sites (21% of all those in England), and 23 (50%) of all protected historic marine wrecks in England;
- of 294 registered historic parks and gardens in the South West, a high number are found in Cornwall (36) and in Wiltshire (38).

11.3 Context

11.3.1 This chapter presents official data and analyses that are relevant to an understanding of the state of culture in South West England, and makes comment on regional and sub-regional trends and issues. Given the multiple inter-connections between cultural production and consumption, and between cultural life in different localities, the chapter aims to give an overview of the state of culture, and its relationship to economic, social and environmental issues. Cultural datasets cited in the chapter are available from the [Culture Module](#) web pages (Culture), official websites and via the reference section and hyperlinks.

11.3.2 The Culture and Sport Evidence (CASE) research programme is led by DCMS in association with Arts Council England, English Heritage, Museums Libraries and Archives Council and Sport England. Its aim is to ‘influence the policy agenda in culture and sport in England by generating high quality, relevant research with easy access to a range of analysis and data for partners to build sound arguments.’ (CASE, September 2010). Datasets and a *Regional Insight: South West* (TBR, 2010) are available on the [CASE website](#).

11.3.3 ‘Culture’ is principally taken here to mean the ‘cultural sector’, as defined by the [Data Evidence Toolkit \(DET\)](#) (DCMS, 2002) developed by DCMS (1998; 2001). Research methodologies and definitions have proliferated, and precise quantification has become increasingly problematic. Data cited in this chapter, are mostly taken from the CASE datasets, as well as other official sources and more up-to-date survey results. CASE categorises the culture and sport sector under four broad sub-sectors:

creative, heritage, museums libraries and archives, and sport. This chapter includes tourism data because of the relationship between the region’s cultural and visitor economies.

11.3.4 Chapter content is presented under four main sections: cultural and creative economy; participation and attendance; cultural infrastructure; cultural governance. The chapter concludes with a commentary that draws together regional trends, opportunities and challenges, based on the evidence and the author’s knowledge and understanding of the region’s culture and sport sector and cultural offer. Thus, the chapter blends numerical data, description, analysis and interpretation.

11.4 Introduction

11.4.1 Culture and sport, creativity and innovation, are central themes to the state of culture in South West England. At the forefront of the region’s economic prosperity and way of life, are a strong creative and visitor economy, and a rich cultural heritage and infrastructure. In spite of recent global recession and on-going public spending cuts, research shows the region’s cultural sector continues to thrive and grow. In addition, the profile of cultural and sporting activities is enhanced by the [region’s involvement](#) in the London 2012 Olympic Games and Paralympic Games, and by a Cultural Olympiad programme.

11.5 Cultural and creative economy

11.5.1 The cultural sector’s economic importance to the South West, and notably digital and creative industries, is recognised in key regional economic and cultural documents including the Regional Economic Strategy (SW RDA, 2006), the regional cultural strategy - *A better place to be* - (Culture South West, September 2008b) and the regional cultural infrastructure development strategy - *People, Places and Spaces* - (Culture South West, September 2008a). There are concentrations of economic activity in Bristol and Bath, specifically identified as creative Growth Hubs in National Endowment for Science, Technology and the Arts (NESTA) reports (Chapain *et al*, November 2010) and in the Growth Review (HM Treasury and BIS, December 2010). Given the region’s cultural strengths and the ‘spillover’ effects to other high-growth industries, such as tourism and knowledge-intensive industries, there are considerable opportunities for business start-ups,

new jobs and increased inward investment. This section summarises the economic aspects of culture and creative activity across South West England.

11.5.1 Employment and business

11.5.1.1 According to CASE analysis, employment across all culture and sport sub-sectors, between 2006 and 2008, decreased by 1% from 190,112 to 188,856. This was one of the lowest changes outside of London and the South East (where employment increased). Outside of London and the South East, the South West has the highest regional employment in heritage of all English regions (in 2008 of 7,880) and the second highest for the creative sector at 137,848. The number of VAT-registered businesses in the culture and sport sector increased by 17% from 13,221 to 15,491, with the highest increase in creative businesses at 18% (CASE, September 2010).

11.5.1.2 Cultural and creative businesses are mainly small and owner manager enterprises, many not registered for VAT or operating PAYE, and hence statistically 'invisible' (that is, not included in official data sources such as the Inter-Departmental Business Register (IDBR) and Annual Business Survey (ABS)). Although official economic counts of, for example, employment and businesses, are under-estimations, they serve as useful indicators of size and growth patterns.

11.5.1.3 Looking at the creative industries, CASE analysis found 13,086 VAT-registered creative businesses in the South West (CASE, September 2010), employment of 137,848, and a 7% increase in GVA between 2005/6 and 2007/8. Comparison with previously cited counts is not possible because CASE's data are based on a narrower definition than previously used by DCMS in the *Creative Industries Economic Estimates Bulletins*, and do not take account of non-VAT registered companies and freelance workers, and nor do they include those working in creative occupations outside of the 'core' creative sector. Putting methodological issues aside, CASE base data allows comparison between regions and annual tracked changes.

11.5.1.4 Business models in the cultural sector vary considerably, from public-funded organisations and agencies, through social enterprises and charities, to large and small private companies. Outside of London and the

South East, the South West remains one of the most economically successful regions for cultural enterprise, with strengths in creative industries (particularly crafts, publishing, software computer games and electronic publishing), heritage and cultural tourism. CASE analysis, shows variations between local authorities, with high concentrations of employment and businesses in Bristol, Bath and North East Somerset, Wiltshire, Bournemouth and Poole. Although there are caveats concerning data reliability at local level, as well as definitional accuracy, data show culture and sport enterprise is widely dispersed across the region's urban and rural areas.

11.5.2 Creative industries

11.5.2.1 Creative industries' is an industrially defined grouping and referred to as 'creative' within CASE's categorisation. The subject of much academic and independent research, creative industries is a priority high-growth sector within Government's Growth Review, and important driver of the UK and South West economy. With the announcement of a new strategic body, Creative England, by DCMS (Ed Vaizey MP, Minister for Culture, Communications and Creative Industries, 29 November 2010), and Bristol identified as the creative 'hub' for southern England, this sector offers considerable scope for new business start ups and employment growth.

11.5.2.2 The term 'creative industries' refers (DCMS, 2001: 4) to "those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property". Thus, the core sector incorporates: advertising, architecture, craft, design, dressing/making, literature, publishing, radio & TV, software computer games & electronic publishing, video film photography, art & antiques, designer fashion, music visual & performing arts. A wider notion is that of the 'creative economy', embracing those indirectly engaged in creative occupations but that lie outside the core creative industries.

11.5.2.3 Of local creative units in South West England, directly engaged in the South West's creative industries (excluding non-VAT registered businesses and the self-employed), 61% are found in urban areas (compared to an England average of 80%). This finding correlates with the South West's rural geography and low number

of large urban centres. As most businesses in the region are micro sized and employ less than 10 people (Creative & Cultural Skills, 2009), the counts are likely to be significant under-estimations.

11.5.2.4 Clusters of creative business are associated with urban centres, and particularly in Bristol and Bath that rank in the top nine creative 'hubs' outside London (Chapain *et al*, November 2010). While urban creative clusters have long been linked to economic development, innovation and urban regeneration (Porter, 1998; Bagwell, 2008), other factors are stimulating cluster development in more rural areas such as Cornwall and Dorset. Certainly, recent research of non-urban based clusters (Bagwell, 2008) point to the effect of social and cultural motivations on clustering and networking patterns.

11.5.2.5 A blended 'creative and cultural industries' sector profile, compiled by Creative & Cultural Skills (2009), provides data on a specific Sector Skills Council 'footprint' that is different to the DET model. The 'footprint' comprises: design, music, craft, literary arts, performing arts, cultural heritage, visual arts and advertising. Thus, employment in this analysis, cites a workforce of 60,690 that grew by 19% between 2006 and 2008. A GVA per employee of £25,050 is reported, with certain sub-sectors, such as cultural heritage, contributing non-economic values - social capital, community cohesion and enhancements. Employment patterns vary with: self-employment rates of 76% in visual arts, down to 21% in advertising; 32% of the workforce are part-time workers and particularly in music; 98% are from White backgrounds; 59% are male; 46% are under the age of 40 years. Of the 21,620 businesses identified from a number of different sources, 88% employ less than five workers and 93% employ less than 50 workers.

11.5.2.6 Notwithstanding definitional debates and statistical disparities, economic mapping exercises consistently show growth across the value chain of origination, production, reproduction, marketing, distribution and sales (Frontier Economics, 2007; Work Foundation, July 2007; Burns Owens Partnership, November 2007). According to NESTA commissioned research, the creative industries account for 6.4% of the UK's economy, and '...between 2009 and 2013, the UK's creative industries will grow (in terms of GVA), on average, by 4%, more than

double the rate of the rest of the economy' (Higgs *et al*, 2008). The South West has a national and international reputation for animation and factual and natural history television, publishing and crafts. Research reported on the IDea '[Creative Industries: a guide for investing](#)' website, shows regional specialisations in software, computer games and electronic publishing (Bristol and Bath area), architecture, music, visual arts and publishing.

11.5.2.7 Global recession and increased competitiveness are said to adversely and especially affect the cultural and creative industries (DCLG and DCMS, May 2009; HM Treasury and BIS, November 2010). While there is limited robust evidence of the impact of these issues on the creative economy in South West England, findings from national studies are likely to apply (Leadbeater and Meadway, December 2008). The creative sector faces problems of: under capitalisation; access to finance; Intellectual Property rights issues, lower levels of corporate sponsorship; out-moded business models; competition from outside the region and UK; under investment in workforce training and apprenticeships. In addition, the sector's high number of micro-sized businesses, dispersed location, and reliance of some sub-sectors on public commissions and severely hit parts of the economy (for example, advertising, design, and architecture), are said to make the creative industries vulnerable to the present economic climate. However, the flourishing creative clusters in Bristol and Bath, and their known 'spillover' effects to other high-growth sectors including manufacturing and knowledge-intensive industries, indicate positive economic trends in certain parts of the South West (Chapain *et al*, November 2010, NESTA, October 2009).

11.5.2.8 The Arts & Business annual survey, Private Investment in Culture Survey 09/10, found that private investment in the South West increased by 25%, compared to an overall GB decrease of 3%. Of the £22.2 million invested, 32% was from corporate sources, 23% from private philanthropy and the remainder from Trusts and Foundation. Breakdown of investment in different artforms shows the major share (34%) was given to theatre and drama (compared to national average of 8%) and 3% to heritage (compared to a national average of 32%).

11.5.2.9 Location and crew services (for film, television and corporate film productions), generates considerable inward investment to local economies, particularly in rural and coastal areas. Production filming generated an estimated spend of £62 million in 2009/10 (South West Screen, 2010).

11.5.3 Tourism

11.5.3.1 Tourism is a major contributor to the South West's economy, as evidenced in the Value of Tourism 2008 (South West Tourism April 2010). Drawing together data from different official sources show a total visitor related spend (day and staying) worth £9.4 billion, and a total number of trips (day and staying) of 118,014,000. Of the visitor economy, domestic visitors dominate the market in the South West, generating £8.4 billion spend in 2008, including expenditure on second homes, boats and entertainments. According to rigorous analysis of 2006 data, tourist businesses generated the highest share of UK tourism activity at 9% of the region's economic outputs (TIU, May 2010).

11.5.3.2 According to SW Tourism's monthly survey, *How's Business* (September 2010) more businesses in the South West estimate an increase of visitors, from 30% in September 2009 to 37% in September 2010, and more reported an increase in turnover, from 35% to 38%. However, optimism levels for the future remains moderate and lower than for the same month in 2009.

11.5.3.3 Looking at VisitEngland data on domestic visitors, the South West is the most popular holiday destination, with an increase in trips from 19 million in 2008 to 21 million in 2009. The South West's share of England domestic visitor trips in 2009 at 20.4%, and spend at 23.9%, were the highest for all English regions including London and the South East (VisitEngland, 2009).

11.5.3.4 Of leisure day visits (English Leisure Day Visits Survey, 2008), total expenditure on day visits was highest on trips taken to the South East (£1390 million), followed by the East of England (£927 million) and then the South West (£570 million). Across the England, the largest number of rural leisure visits were taken to the South East (163.9 million trips), followed by the East of England (109.0 million trips) and the South West (104.7 million trips). Average

expenditure per day trip was highest amongst residents of London (£31.87) and lowest amongst residents of the South West (£19.76).

11.5.3.5 The CASE *Regional Insight: South West* (TBR, 2010) reports international visitor numbers to the region increased by 14% between 2004-2008, with an overseas visitor spend in 2008 of £983 million (an increase of 38%). Looking at the first three quarters of 2009 VisitEngland data for the South West, the trends are positive - in Quarter 3 (July-September) 2009, compared to the same period in 2008, visitor numbers and spend had increased but staying nights had decreased.

11.5.3.6 Based on a sample of 632 attractions, England Attractions Monitor Quarter 3 Report July-September 2010, shows admission numbers across England increased, particularly for rural attractions - in spite of wet weather and the low confidence of traders. Attractions reported an increase in British visitors on 'staycations', reflecting UK Tourism Survey evidence of a strong increase in overnight leisure stays among the domestic population. Furthermore, those attractions reporting an increase in domestic visitors, also registered a sharp increase in the summer period (for the South West, there was a 10% increase in August admissions compared to August 2008). In 2009, owners of south west attractions in Quarter 3 (July-September) were 44% more optimistic about trade than in 2008, with 14% less optimistic (just above the English average of 43% and 13% respectively). According to VisitEngland, the Top 10 free attractions in England included the Grand Pier at Weston-super-Mare, and in the Top 20 paid attractions were The Eden Project in Cornwall, Stonehenge and the Roman Baths in Bath. The South West's thriving cultural tourism closely relates to the high number of arts, sports and MLA physical assets per 10,000 people, with the largest proportion of these assets being heritage related (57%).

11.6 Participation and attendance

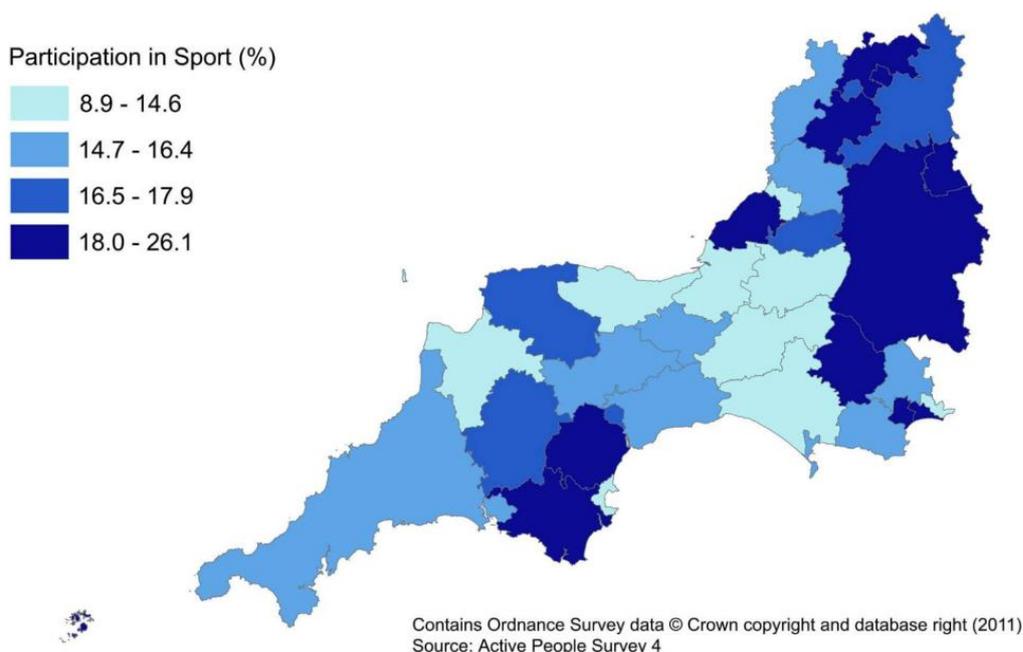
11.6.1 Sport

11.6.1.1 At the heart of the Sport England Strategy 2008-11 is a commitment to getting more people taking part in sport by 2012-13 – known as the "1 million target". A sports participation indicator measures the number of adults (aged 16 and over) participating in at least 30 minutes of sport at moderate intensity at least

three times a week. Results from the Active People Survey 2009/10 show a rate of 16.5% that has remained significantly unchanged since 2007/08 and compares to the England average of 16.4%. There are variations between County Sports Partnerships and local authority areas. Gloucestershire Sport County Partnership saw an increase from 17.2% to 19.3%.

11.6.1.2 Participation rates vary across the South West region (see Map), with higher than average rates in, for example, Cheltenham (25.7%), but lower rates, for example in Somerset of 13.2%.

Figure 11.6.1.1 Participation in Sport: Percentage of adults participating in at least 3 sessions of sport a week (defined as at least 30 mins of moderate activity).



11.6.1.3 Of results for 30 minutes of moderate intensity sport and recreation activity (previously known as National Indicator 8 and a different measure to KPI 1), participation rates recorded in Active People Survey 4 (APS4) show little or no change. A rate of 23.2% for the South West is the highest of all English regions and compares to the England average of 21.8%. There are local variations such as Gloucestershire at 27% through to Plymouth at 20.1%. These figures indicate over 75% of the adult population do not participate regularly in sport or recreation activity.

11.6.1.4 One of Sport England's key strategic targets is to reduce the drop off in participation in nine key sports. The nine sports that will be

tackling 16-18 year old drop off in their 2009-13 Whole Sport Plans are: badminton, basketball, football, gymnastics, hockey, netball, rugby league, rugby union, and tennis. In the period between 2007/8 (Active People Survey 2) and 2009/10 (Active People Survey 4), once a week participation amongst 18 year olds, across the 9 drop off sports, and across England, increased from 189,100 18 year olds (28.23%) to 204,700 18 year olds (29.81%), an increase of 15,600.

11.6.1.5 Other Active People sports findings (Key Performance Indicators for volunteering, club membership, tuition, organised competition and satisfaction) show relatively small or no change between APS2 and APS4. The rate of volunteering in sports activities (KPI 2) for England decreased from 4.9% to 4.5%, but the

South West average increased to 5.3% and is the highest rate for all regions. Again, satisfaction with sports facilities is highest in the South West, with an increase from 69.6% to 71.9% (compared to the England average of 69%).

11.6.1.6 Participation in volunteering beyond sport (informal and formal) is reported in the Citizenship Survey and published by the Department for Communities and Local Government (DCLG). Rates in the South West are above average for both informal and formal types of volunteering (once a month, and once in the past 12 months). Comparison between 2008/09 and 2009/10, shows Informal volunteering once a month in the South West has fallen from 36% to 32% of respondents (compared to the England average of 35% and 29% respectively). However, formal volunteering rates, though lower, have increased from 29% to 31% (with a decrease to the England average from 26% to 25%). The main barrier to participation in volunteering is cited as 'work commitments' – that may correlate with workplace pressures that are imposed by economic constraints. The region's higher than average volunteering rates may in part be due to a demographically older population, of whom older and retired people are more likely to have spare time to engage in volunteering.

11.6.2 Libraries

11.6.2.1 Measurement of visits to a public library relates to National Indicator 9 (NI9), and was added to Active People Survey 2 (APS2) in April 2008. Overall the South West adult population use of libraries, like all other English regions, has decreased from 47.8% in 2008 to 44% in 2010 (compared to England decrease from 48.5% to 45% in the same period). According to APS4 findings, attendance rates vary across local authority areas, from 46.6% in Torbay, 42.7% in Bath and North East Somerset and 39.7% in South Gloucestershire.

11.6.2.2 In 2007, the region's 895 libraries were reported to be the most used in the UK (Museums, Libraries and Archives Council, 2008). Analysis of Taking Part Survey findings show attendance rates in the South West (at least one physical visit in the past 12 months) have steadily declined from 47.9% in 2005/06 to 38.8% in 2009/10. Nationally, rates in urban areas have also fallen from 48.5% to 40.1%, and in rural areas from 47.1% to 36.5%. Adults living in 'hard pressed' neighbourhoods had lower

rates than all other neighbourhood types. National data reveals higher attendance rates for women, higher socio-economic groups and people not in employment.

11.6.3 Museums and galleries

11.6.3.1 Visits to museums and galleries at least once in the past 12 months, corresponds to National Indicator 10 (NI10). According to Active People Survey findings, rates fell between 2008 (APS2) and 2010 (APS4) in the South West from 52.9% to 51.4%, but with varying levels across local authorities - for example unchanged rates in Bristol (61.4%) and Bath and North East Somerset (59.6%), an increase to 59.1% in Exeter, and a 4.3% decrease to 46.5% in Taunton Deane.

11.6.3.2 These negative trends contrast with Taking Part survey data (DCMS, 2010) that show visits to eighteen of DCMS' direct sponsored museums has remained unchanged at 41.1%. With a slight but steady increase since 2005/06 (39.8%), free admissions to publicly owned museums may partly account for this trend – as will well publicised exhibitions.

11.6.3.3 Local authority owned museums and galleries (the majority of those in England) are on the whole under pressure from falling admissions and local authority cutbacks. Economic recession and reallocation of National Lottery funds to the London Olympics 2012, are compounding an already difficult situation.

11.6.4 Arts

11.6.4.1 Examination of Active People Survey 4 (APS4) results for engagement in the arts show no change between 2008 and 2010, with a rate of 47.6% of adult respondents engaged in arts activities. This compares to slight decreases in most other regions and a decrease of the England average from 45.2% to 43.8%. Rates in local authorities vary with decreases for 2010 reported in Dorset (46.1%), Poole (43.6%) and Taunton Deane (40.8%) but increased rates in Exeter (52.4%) and West Somerset (51%).

11.6.4.2 Taking Part Survey findings for the South West show higher participation than Active People Survey findings, and a fall in engagement between 2005/06 and 2009/10, from 82.1% to 75.9%. Segmentation analysis of Taking Part findings, undertaken by Arts Council England and Oxford University (Bunting et al, April 2008)

found 84% of all adult respondents belong to the 'little if anything' or 'now and then' categories of attendees. Nationally, the most significant factors that affect positive attendance are higher levels of education and social status. This analysis will apply to the South West, but there will be the added effects of rural isolation and access to facilities.

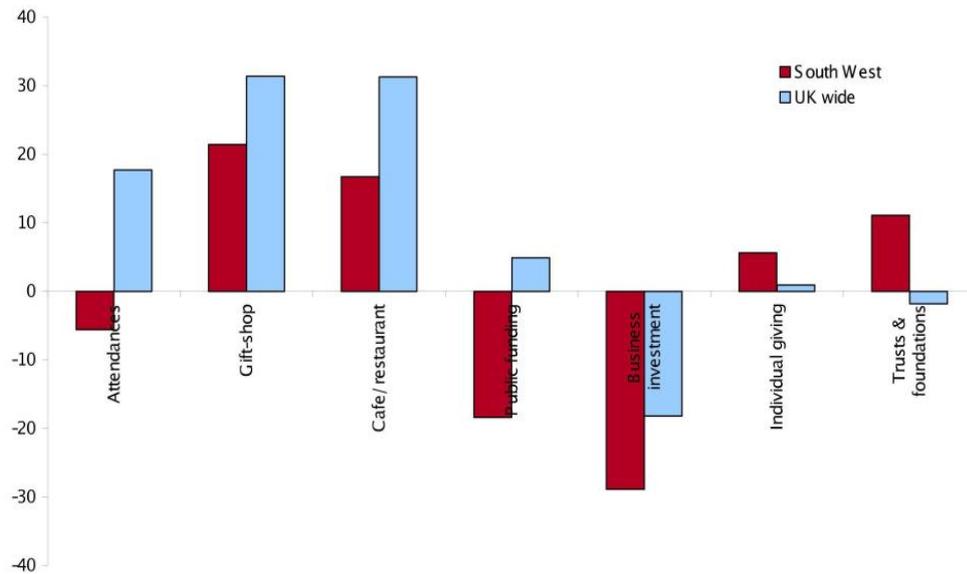
11.6.4.3 Nationally, Taking Part results, reported in Social Trends 38 (Corp, 2010), show the most common leisure activities in 2005/06 were watching television (82%) and spending time with family and friends (75%). Combine this finding with increased use of the Internet, it is unsurprising that rates in other cultural and sport activities have not significantly changed. In 2007, more than 84% of households with internet access had a broadband connection (equivalent to 51% of households in the UK), and 81% of households had a digital television.

11.6.4.4 A qualitative approach to engagement in the arts, and 'public value', was explored in Arts Council England's 'arts debate' conducted during 2006. Findings, reported in a series of papers (Bunting, 2006a; 2006b; 2007, 2009), show there is widespread support for the principle of public funding of the arts, but only if linked to certain key outcomes. Following this inquiry, Arts Council England implemented a 3-year public value programme (2008-11) that includes further research and development projects. Following public spending cutbacks announced in June and October 2010, Arts Council England is undertaking major review of its funding strategies and priorities.

11.6.4.5 Recent Arts Council England analysis (Gray, 2008) of the impact of recession on arts organisations, based on data from Regularly Funded Organisations (RFOs), show that in March 2009, respondents had seen a reduction in revenue from sponsorship and local authorities compared to December 2008. Around a quarter of respondents had already made staff redundant or taken measures to freeze staff pay. This trend continues, with the outcome of reviews of RFO funding by Arts Council England and local authorities to be announced in early 2011.

11.6.4.6 Arts & Business market trends research (2009a), based on a sample of 250 arts organisations across the UK, suggests that while levels of business and individual giving have fallen, revenue from sales has increased. In the South West, respondents reported a 79% decrease in business investments, but gift shop sales increased by 71.4% and cafe and restaurant sales by 66.7%. Interestingly, Arts & Business research with City University London (Galo, August 2009; Arts & Business, 2009b) found individual giving is the single largest source of private investment for the arts, and seem relatively unaffected by economic crisis. However, anecdotal evidence from cultural festivals in the South West, such as Wildscreen Natural History Film Festival, Encounters Film Festival, and Bath International Music Festival, suggest public and private sponsorship has dramatically fallen.

Figure 11.6.4.1 Arts Performance Index (API) ranging from +50 to -50, 2009



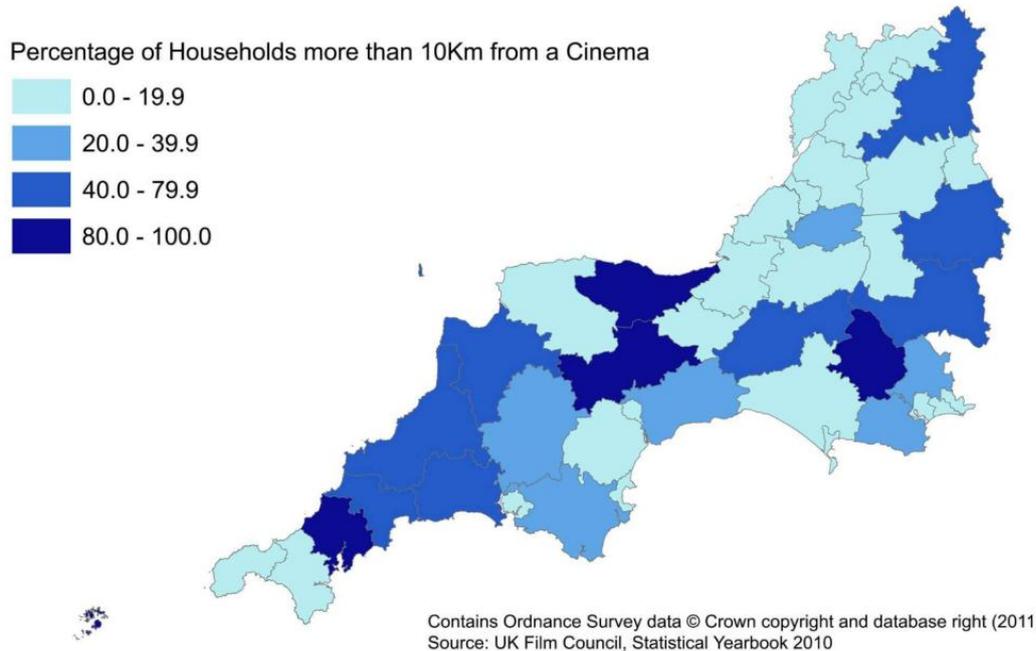
Source: Arts and Business, Market Trends Report, Summer/Autumn 2009

11.6.5 Cinema

11.6.5.1 Admissions to cinema are monitored by the UK Film Council, whose annual statistical yearbooks show a steady increase in the South West (from 3.3 million in 2006, 3.9 million in 2008 and 4.3 million in 2009). Based on a region's number of screens and population (ONS 2008 mid term estimates), the 2010 yearbook calculates a level of 'cinema deprivation' across England. For the South West, with 316 screens

and a population of just over 5 million, the calculation is 6.1 screens per 100,000 of the population (compared to an England average of 5). There are, unsurprisingly, different levels of access to cinemas across the region, particularly for those living in rural isolated areas. Cinema provision varies across local authority areas in England (see Map). Districts which can be considered 'cinema deprived' are those where over 80% of households are more than 10 kilometres from the nearest commercial cinema - there are no such districts in the South West.

Figure 11.6.5.1 Cinema Deprivation



11.6.5.2 The South West has the second highest household spend on 'recreation and culture' of all nine English regions, with an average weekly spend of £63.60, compared to the UK average of £58.30 (ONS, November 2010). Although total family weekly spend has declined over the last year across all the UK (with a 2009 average of £474.10 in the South West), 'recreation and culture' is still a major expenditure category. In the South West, spend on 'recreation and culture' is higher than on 'food and non alcoholic drinks' (£49.80). National interrogation of 2009 family spending (ONS, 2010) shows 'prosperous young families' and a 'village life' group within the 'countryside supergroup' are the highest spenders on 'recreation and culture'. Of the UK's average weekly family spend on this category: approximately a third (32 per cent) of spending on recreation and culture (£18.70 per week) was spent on recreational and cultural services; sports admissions, leisure class fees and equipment hire accounted for £5.00 per week; cinema, theatre and museums etc £2.30 per week; TV, video, satellite rental, cable

subscriptions, TV licenses and internet £5.90 per week; and gambling payments £4.10 per week.

11.6.6 Historic Environment

11.6.6.1 Participation in the historic environment is measured by Heritage Counts, an annual report of the state of England's historic environment, and is published by English Heritage. According to 2009/10 results for the South West, adult participation in the historic environment has decreased from 72.7% (2008/09) to 69.8% (2009/10); Black and Minority Ethnic group participation has decreased from 67.9% to 60.5%; and rates for lower socio-economic groups decreased from 62.2% to 54.7%.

11.6.6.2 In terms of visits to historic sites, there was a slight decline in visitor numbers between 2007/08 and 2008/09, with English Heritage and the National Trust experiencing a 3% and 2% fall in numbers respectively. There were concerns that the economic situation would have a persistent negative impact on visitor numbers to historic environment sites. However, comparison of the visitor numbers at National

Trust sites show a healthy increase of 15% between 2008 and 2010, and a 5.6% increase at English Heritage sites. Research undertaken during April-June 2009 indicates that membership schemes and public events were having a strong positive impact on the performance of historic attractions and were likely to increase in importance in the medium term. This is borne out by first quarter 2009/10 figures for English Heritage properties in the South West, which, due to a strong event programme and buoyant UK domestic visitor market, experienced a 25% increase in admissions income and a 31% increase on membership income.

11.6.6.3 Of education visits, Heritage Counts 2010 reported a 3% decrease on 2008/09 numbers (70,519). Nonetheless, English Heritage education visits in the South West have increased by 33% since 2001– the highest percentage of all regions, and contrary to a national decrease of 7%. Visits in the region account for nearly 20% of all English Heritage Education visits.

11.7 Cultural infrastructure

11.7.1 This section examines the state of the region's hard and 'soft' cultural and sporting facilities and resources, and future trends. The South West has an international reputation for the quality and breadth of its cultural and sporting assets, together forming an infrastructure of benefit to local residents and visitors alike. A cultural infrastructure development strategy, *People, Places and Spaces* (Culture South West, September 2008a) and is complemented by the Culture and Sport Physical Assets Mapping Toolkit (TBR, August 2010). The latter provides guidance on auditing and decision-making processes, regarding the location and quantity of local culture and sport resources in an area. According to CASE's *Regional Insight: South West*, there are 26,600 physical assets located in the region.

11.7.1 Historic and natural environment

11.7.1.1 In 2009, English Heritage commissioned research to explore the role of the historic environment in creating a stronger sense of place. The research (Graham et al, June 2009) produced the first robust evidence

base, demonstrating a strong link between the historic environment and a stronger sense of place. Key findings from the report include:

- The historic environment has a positive and important relationship to people's sense of place;
- Adults who live in areas with higher concentrations of historic environment (such as the South West) are likely to have a stronger sense of place;
- Adults who are more interested in the historic environment are more likely to have a stronger sense of place.

11.7.1.2 In the South West, Heritage Counts 2010 reported: 6,968 scheduled monuments (a third of England's total and an increase of 65 between 2003 and 2010), 88,676 listed buildings (an increase of 461 between 2003 and 2010). The National Trust open 83 historic houses and gardens in the South West and English Heritage open over 100 historic sites, including Stonehenge and Tintagel Castle. In addition to land-based historic sites, there are 23 marine-based protected historic wrecks registered for the South West (50% of all those for England in 2010). These historic assets pose considerable challenges to their custodians and local authority owners, not least being the impacts of climate change and public spending cuts.

11.7.2 Historic Parks and Gardens

11.7.2.1 There are currently 294 registered historic parks and gardens, and 1,534 conservation areas in the South West. The region's natural heritage forms an integral part of individual local cultural identities and a distinct tourist offer, with Important Areas of Outstanding Beauty such as the Cotswolds, Mendips, Quantocks, the National Parks of Dartmoor and Exmoor, and coastlines of Dorset and Devon (Jurassic Coast) and Cornwall. Four UNESCO World Heritage Sites are located 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.

11.7.3 Other Cultural and Sporting Assets

11.7.3.1 Of increased importance to the South West, is the number and variety of large-scale cultural and sporting festivals and events that

attract huge audiences and generate considerable inward investment and revenues. On the arts and media side, these include: Bath International Music Festival, Glastonbury Music Festival, Bath Literature Festival and the Jane Austen Festival, Cheltenham Literature Festival and Screenwriting Festival, Encounters International Short Film Festival and Wildscreen Natural History Film Festival as well as Ashton Gate Balloon Festival and St Paul's Carnival in Bristol, the Bridgwater Carnival, the Agatha Christie Festival in Torquay and the Daphne du Maurier Festival in Cornwall. For sports events and venues, these include: Cheltenham Races, Somerset Cricket Ground, Bath Rugby Ground, and the London 2012 Olympic and Paralympic Games training camps and event sites at, for example, University of Bath and the National Sailing Academy at Weymouth.

11.7.3.2 There is a paucity of evidence about existing and future convergences between the region's cultural and creative assets, and tourism in the South West. While it is easy to deduce from quantitative data (as outlined above), that the number and singularity of such assets correspond to the visitor economy, more nuanced interpretation is needed for future planning and development purposes.

11.7.3.3 According to Museums, Libraries and Archives Council (Murray, 2009) there are approximately 2,000 museums, galleries,

libraries and archives in the South West, serving a wide constituency and range of specialist interest groups. These buildings and collections form a valuable knowledge bank for local communities, as well as for visitors and scholars. According to Museums, Libraries and Archives Council, museums in the region have benefited from £23.8 million as part of the Renaissance programme, with Investment focused on five 'Hub' museums in Bristol, Bournemouth, Exeter, Plymouth and Truro.

11.7.3.4 CASE analysis of selected data sources for the period 2004/05 to 2008/09, found non-capital investment by local authorities in the South West increased by 10% (reaching approximately £337 million), and an increase of 78% increase in capital investment (reaching £71 million – not including heritage). The majority of 2008/09 non-capital spend was on sports and MLA sector, with arts spend increasing by 13% compared to an England average of 9%. Of local authorities ranked by non-capital investment in CASE sectors, the top five were: Bristol, Bournemouth, Swindon, Plymouth, Bath and North East Somerset. A similar ranking is shown below for capital investment, with Bristol the highest spender in MLA and arts sectors, Bournemouth in sports and Swindon in libraries (see Table 11.7.3.1). Examination of the full list of local authorities shows significantly different levels of spend that relates to their population size.

Table 11.7.3.1 Top Local Authorities for capital investment in new construction conversion and renovation by investment area in 2008/09

Investment Area	Local Authority	Investment (£000s)
Museums and Galleries	City of Bristol	12,656
Arts activities and Facilities	City of Bristol	10,619
Sports Facilities	Bournemouth	5,661
Library Services	Swindon	5,148
Source: <i>Regional Insight: South West</i> , CASE		

11.7.3.5 While the historic built environment forms an important part of the region's infrastructure, there are, of course, a growing number of new-build and refurbished cultural facilities. These include such popular sites as The Eden Project in Cornwall, Watershed in Bristol, Swindon Central Library and the re-furbished Bournemouth International Centre.

Also notable are the range, quality and size of sporting facilities listed in Sport England's Active Places database (Sport England, 2010), that signify a substantial infrastructure for residents and visitors to engage in sports and active recreation.

11.7.4 Culture and Society

11.7.4.1 Evidence suggests that the extent to which people invest and participate in cultural and sporting activities, influences their sense of well-being and belonging, and a community's coherence and distinctiveness (Bunting et al, 2008; EPPI, July 2010). Data from the national surveys (such as Active People, Taking Part and Heritage Counts), as summarised above, indicate a fairly static position for participation by South West residents. However, there are significant differences of rates between local authority areas, between socio-economic groups, and accessibility to facilities for those living in urban or rural locations. According to CASE analysis of community survey data, found 77% of respondents in the South West felt strongly that they belonged to their neighbourhood. Approximately 13% thought that their local area had improved in the past 2 years (compared to national average of 15%).

11.7.4.2 Research commissioned by Culture South West (Hennessy and Giarchi, 2006) demonstrated the importance of cultural activity to the lives of older people, and the contribution, in turn, that older people make to a vibrant and diverse community and way of life. Cultural activities, such as hobbies, sports, religion and volunteering, were shown to promote health and well-being in later life, and to generate social capital. The report articulates the impact of demographic ageing on the development of age-specific cultural products and services. With an on-going and significant trend in the South West towards an ageing population, and national concern with growing levels of dementia in old people, such evidence supports the case for better understanding of people's demand for and response to cultural and sport services. With the highest proportion of people of state pensionable age living in the region of all English regions (over 22% in 2008, ONS, 2010), new ways of thinking about old age, retirement and public services are unavoidable (Bedell and Young, April 2009).

11.8 Cultural sector governance

11.8.1 The Department for Culture, Media and Sport (DCMS) is the lead sponsoring Government Department for developing and delivering public policy on culture, media and sport, for public broadcasting licenses, for managing the London 2012 Olympic Games and Paralympic Games, and for directing public

investment in culture and sport activities including National Lottery funds. DCMS devolves its statutory and governmental responsibilities to a range of national cultural agencies (known as Non Departmental Public Bodies) and commissioned organisations. At the national scale, the principal DCMS sponsored bodies are: Arts Council England, English Heritage, Sport England, VisitEngland and British Film Institute, along with the Centre for Architecture and the Built Environment (CABE), Museums Libraries and Archives Council and the UK Film Council (that will be disbanded as of April 2011). Other Departments, such as Business, Innovation and Skills (BIS) and Communities and Local Government (DCLG) are also involved in aspects of cultural and sport policy development (economic growth, health, social well-being) and delegate these responsibilities to bodies such as SW RDA (abolished as of March 2012), Business Links, Big Lottery Fund and Heritage Lottery Fund.

11.8.2 With radical structural reform taking place at national and regional scales, decision-making powers over public-funded cultural and sport services are being devolved to local authorities and to the new Local Enterprise Partnerships. In South West England, two strategic partnerships are also active on cultural and sport service prioritisation and improvement: firstly, South West Culture Board of representatives from Arts Council England, English Heritage South West, Museums, Libraries and Archives Council and Sport England; and secondly, the South West Local Authority Cultural Partnership of cultural service leaders and representatives from the cultural agencies. Re-structure of cultural governance at the national and regional levels (described above), is similarly affecting many local authorities. While cultural services are not a mandatory service area, local authorities are being hard-pressed to maintain them, in the face of competing demands, departmental mergers and staff redundancies (McPherson, 2008).

11.8.3 Government and agencies acknowledge the challenges presented by current political and economic circumstances, but they also point to opportunities for improvement. To this end, governance and governmental bodies (national, regional and local) are seeking new service delivery models and partnerships – such organisational re-structures, collaborations, mergers and social enterprise. In the case of local authorities, radical

governance solutions are being explored, in collaboration with local strategic cultural partnerships - Culture Swindon (Swindon Borough Council, 2009) and Creative Dorset are two such examples.

11.9 Commentary

11.9.1 The chapter presents mostly quantitative data and statistics from mainstream official sources, to give a comprehensive overview of the state of culture in South West England. With a renewed emphasis on evidence-based policy and decision-making, the approach adopted in this chapter is deliberate. Economic and cultural development strategies, many of which are cited in the sections above, set out ambitious objectives and outcomes that require monitoring and evaluation. It is to this end, that surveys such as Active People, Taking Part and Heritage Counts are conducted and publications such as State of the South West 2011 provide data and analysis at regional and, where possible, at local level.

11.9.2 Overall, economic data indicate that the region's culture and sport sector, and particularly the creative industries, are performing well. Tracking progress, on the basis of consistent and accurate data, remains problematic because of definitional and methodological difficulties. The DCMS-led Culture and Sport Evidence programme has begun to address these issues with publication of technical guidance reports and datasets. It is arguable, however, that statistics explain only part of the dynamics and subtleties of cultural production and consumption. A NESTA report (Boyle *et al*, April 2010) criticised public service KPIs, as a 'narrow range of anticipated activities and evidenced by limited indicators of success'. A review of standard KPIs and reporting methodologies, would help find a better match between activity and measures of success, including those applied to the cultural sector.

11.9.3 Given the importance of the creative and heritage sub-sectors to the South West's economy, and to local visitor economies (counter-balanced by residents' relatively low participation rates in culture and sport), it is imperative that further research and analysis are undertaken, to more fully inform investment decisions. Today's state of culture in South West England raises questions such as: 'what conditions stimulate growth of cultural and creative industries?', 'how should creative hubs

be supported and their effects disseminated more widely?', and 'if engagement in culture and sport is known to be highly beneficial, why do participation rates remain low?', and 'what cultural and sporting infrastructure do local residents need now and in the future?'

11.9.4 Public engagement in culture and sport activities is higher in the South West than in most other parts of England. For volunteering in sports, participation in the arts and historic environment, regional rates are above the national average. Closer investigation, however, shows rates for certain groups are well below average – Black and Minority Ethnic groups, people with a limiting disability and low socio-economic groups. Disparities are also evident between local authority areas, and although much of the data cannot be interrogated at ward level, it is probable that engagement rates vary between these localities. Market segment profiles, such as those developed by Sport England, provide more in-depth analysis of Active People Survey data, and build a better picture of local patterns. Caution is required, however, when engagement rates are interpreted for policy and planning purposes. Decreased rates of participation in certain culture and sport activities - for example, visits to libraries - would seem to indicate a lower value placed on this service and justify reduced public investment. But, in-depth research and local intelligence may reveal an alternative explanation and different course of action.

11.9.5 At a time of rapid economic and political change, compounded by public spending cuts, culture and sport infrastructure development is a critical issue for those involved in strategic planning and public and private investment decisions. Databases of culture and sport facilities, and registers of listed historic buildings, parks and gardens, provide irrefutable evidence of the unique ancient and modern assets located in South West England. But these audits pose challenges and opportunities that are twofold: (1) how to ensure the existing infrastructure is maintained and conserved for users today and in the future and (2) how to identify gaps in provision and plan for new development. While responsibility for the solutions has shifted to the individual and private entrepreneur, there are practical tools and resources, such as [Living Places Culture and Sport Planning Toolkit](#) (DCLG and DCMS, March 2009) and CASE research, that people in the private and public sector can use to make their decisions.