

# The Value of Arts and Culture in Place-shaping

August 2019

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Date of document: 22 August 2019

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## Acknowledgements

We would also like to thank the many individuals who gave their time to assist in the evaluation, including the focus group participants, business leaders and local businesses in each of the six areas and the strategic contributors listed in the appendices, all of whom were important in the writing of this report. This research would not have been possible without all of these contributions.

## List of abbreviations

BIDS	Business Improvement Districts
CBFS	Culture and Business Fund Scotland
CPP	Creative People and Places Programme
CSR	Corporate Social Responsibility
FDI	Foreign Direct Investment
GVA	Gross Value Added
LEP	Local Enterprise Partnership
MHCLG	Ministry of Housing, Communities and Local Government
NS-SEC	National Statistics Socio-Economic Classification

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# Executive summary

## Introduction

In October 2018 Arts Council England commissioned Wavehill Ltd. to deliver a research project to aid their understanding and help them to articulate *if* and *how* the arts and cultural offer within a place can attract and retain individuals and businesses and help to shape its identity. In broad terms this research seeks to generate further evidence to support the notion that arts and culture has the ability to promote and drive positive economic and social outcomes at a local level and thus contribute effectively to a place-shaping approach. This report presents themes from primary data collection to inform Arts Council England's thinking in this area.

## Research method

The research team used a multi-method approach to generate a rich qualitative and quantitative data set from which key themes and insights have been identified. The key elements of the primary fieldwork included a nationally representative survey of adults with the sample derived from the Active Lives survey, a series of focus groups in six locations (which include a mix of cities and towns) across England to test in more depth the findings from the survey, interviews with a sample of businesses and business leaders across these six locations, and interviews with strategic partners including representatives from local council inward investment teams, Chambers of Commerce, Business Improvement Districts and regional growth companies.

## Creative desirable places to live

### Building stronger communities

The national survey findings demonstrate that arts and culture support personal wellbeing. A strong arts and cultural offer makes people feel more content and thus more likely to stay within an area. Accounting for a range of factors that influence life satisfaction, people attending a wider range of arts and cultural events are more satisfied with their lives than people who don't.

### Fostering community cohesion

People who view a sense of community as being important to them were most likely to agree that attending arts and culture events helped them feel part of their community. This finding was reinforced in the focus group sessions with participants articulating that a strong and vibrant arts and cultural offer was integral to providing opportunities for communities to come together. Engaging in local arts and cultural activities is valuable in fostering a sense of collective identity, space for interaction and shared experience and thus contributes towards people having a stronger attachment to place.

## **Attracting and retaining people to live and work**

The research indicates that the local arts and cultural offer is a factor, both for people considering moving to an area and for people remaining within an area. Arts and culture was cited as an equal priority to 'schools' in people's decision to move to, or remain in an area. These findings support a notion that a strong local arts and cultural offer can play a role in attracting and retaining workers.

The analysis of the national survey data found no correlation based on employment status, IMD ranking, NS-SEC or Arts Council England region. In other words, the arts and cultural offer as a pull factor is equally important to someone employed in a high-skilled job as to someone seeking employment in a lower skilled role. What this means is that a strong arts and cultural offer can help a broad range of employers across different sectors to attract workers. The survey data also reveals that respondents who live in an area with more cultural assets are more likely to be satisfied with their local area as a place to live, which can contribute towards stronger worker retention rates. There is recognition that a strong arts and cultural offer helps businesses to sell the benefits of moving to an area in relation to improved quality of life and encouraging a positive work and life balance.

## **Place marketing, inward investment and economic growth**

### **Supporting economic growth**

A number of research studies have highlighted the local economic impact of arts and culture, including references to financial return on investment, regional performance or contribution to overall UK economic performance. Strategic partners emphasised the value of a strong arts and cultural offer in helping to attract creative entrepreneurs and enterprises who, given their size, can be more flexible in their location decisions. As the creative industries are characterised by a younger workforce, location decisions are more likely to be influenced by places where the local arts and cultural offer is regarded as strong, vibrant and growing. A strong arts and cultural offer is recognised as playing an important role in attracting and retaining talent, in particular graduate companies in the digital and creative industries.

### **Place marketing and inward investment**

The Local Government Association emphasises the importance of local councils collaborating with communities to emphasise their cultural character and create a collective place brand. Consultations with representatives from local councils, Chambers of Commerce, Business Improvement Districts and Inward Investment Companies has emphasised the importance of a strong arts and cultural offer in supporting place branding and marketing activities.

Most businesses consulted agreed that a rich cultural offer provides benefits for business in terms of branding, identity and reputation. Regular events and high profile arts activities were regarded as positive opportunities to promote businesses to a larger audience. Positive media coverage of arts and cultural activities is important in putting places 'on the map' and, where necessary, challenging and changing negative perceptions and media stereotypes of the attractiveness of areas as places to live, work and visit.

### **Benefits for the high street**



There are positive examples from across the UK of towns and cities that are successfully transforming their high streets through the growth of high-quality visitor experiences, increasing integration of service industries into the retail mix and by fundamentally having a better understanding of people's need to visit towns and cities for far more than just 'shopping.' A strong arts and cultural offer can support efforts to maintain or enhance the attractiveness of retail centres as places to live, work and visit by offering unique experiences for visitors and/or shoppers through the animation of public spaces including art works, live performances and opportunities for local cultural identity to be explored and celebrated.

The most recent survey of Business Improvement Districts, conducted by British BIDS in 2018, acknowledges the role of culture and arts as an innovation tool and also in helping to attract visitors and increase footfall. Contributors highlighted the potential opportunities arising from the recently announced Future High Streets Fund which was launched to help local areas to respond to and adapt to changes in the high street.

Several contributors also highlighted that aspirations to grow and strengthen their local arts and cultural offer were also linked to local plans to increase residential accommodation in towns and city centres. This growth is largely fuelled by young people, in particular single professionals and a growing student population.

### Business location decisions

Whilst many businesses acknowledge the benefits of a strong local arts and cultural offer in supporting their workforce to achieve a good quality of life, location decisions are more strongly influenced by infrastructure considerations such as transport connectivity, access to a skilled and qualified workforce, proximity to further and higher education institutions, premises availability and costs and competitive wage costs.

However, a strong arts and cultural offer is a more influential factor for businesses within the retail sector, in particular given its recognised contribution to strengthening the visitor economy and generating footfall. A strong arts and cultural offer was also emphasised by many contributors as important in attracting creative entrepreneurs and enterprises who, given their size, can be more flexible in their location decisions.

### Business investment in the local arts and cultural offer

The majority of the businesses consulted did not currently invest in their local arts and cultural offer. Reasons cited included a lack of awareness of the potential benefits for their business and the absence of local networking opportunities to engage with the arts and cultural sector.

The research suggests that there is a need to create space for dialogue between local businesses and arts and cultural organisations to discuss partnership opportunities, collaboration and sponsorship. In some areas the Chamber of Commerce is taking the lead in organising events to bring the business community together with arts and cultural organisations. This has considerable potential to forge new, mutually beneficial partnerships that can support investment in a local arts and cultural offer.

# 1 Introduction

In October 2018 Arts Council England commissioned Wavehill Ltd. to deliver a research project to aid their understanding and help them articulate *if* and *how* the arts and cultural offer within a place can attract and retain individuals and businesses, and help to shape its identity.

There has been increasing recognition of the importance of arts and culture in the lives of people, communities and places. Arts Council England's 10-year strategic framework 'Great Art and Culture for Everyone' highlights that arts and culture plays an important role in local regeneration, in attracting tourists, in the development of talent and innovation, in improving health and wellbeing, and in delivering essential services.<sup>1</sup> The strategy also states that arts and cultural organisations that understand the role they play in their local communities, and work with others to build a sense of place, are crucial to the resilience of the overall sector. This remains an important consideration within Art Council England's ongoing strategy process which will deliver a new strategic plan in late 2019.

The Warwick Commission's report on the future of cultural value<sup>2</sup> emphasises the importance of prioritising the role of culture and creativity in generating a sense of identity, place and community across the country. The authors critique that the role of cultural organisations as strategic partners in the more fundamental place-shaping role, building and moulding local communities and identities, remains underdeveloped. As a result, they argue that the economic, cultural and social strategies that are seen to comprise place-shaping often lack distinctiveness and disregard local cultural expression and heritage.

The Local Government Association also emphasises the importance of local councils collaborating with communities to emphasise their cultural character and create a collective place brand which enables town and city centres to be distinguished from the functionality of retail parks or shopping online.<sup>3</sup> They also highlight the central role that events can play in engaging the local community and growing the visitor economy.

In broad terms this research seeks to generate further evidence to support the notion that arts and culture has the ability to promote and drive positive economic and social outcomes at a local level and thus contribute effectively to a place-shaping approach. This report presents an overview of previous research that explores the role and contribution of arts and culture in place-shaping. It also highlights themes from primary data collection to inform Arts Council England's thinking in this area.

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<sup>1</sup> Arts Council England (2013) 'Great Art and Culture for Everyone: 10-Year Strategic Framework'. 2<sup>nd</sup> Edition

<sup>2</sup> The Warwick Commission (2015) 'Enriching Britain: Culture, Creativity and Growth'. The 2015 Report by the Warwick Commission on the Future of Cultural Value

<sup>3</sup> <https://www.local.gov.uk/topics/economic-growth/revitalising-town-centres-toolkit-councils/function/place-branding-and>

## 2 Research method

The research team has used a multi-method approach to generate a rich qualitative and quantitative data set from which key themes and insight have been identified. The key elements of the primary fieldwork are presented below with full detail provided in [Appendix 1](#).

- A nationally representative survey of adults with the sample derived from the Active Lives survey was administered by Ipsos Mori between May 2017 and May 2018. A total of 1,756 responses were achieved. A copy of the survey tool is provided in [Appendix 2](#).
- The research team scheduled a series of focus groups in six locations across England to test in more depth the findings from the survey. The six locations included a mix of cities and towns and covered all of Arts Council England's areas outside of London, namely: Birmingham, Halifax, Hastings, Redruth, Southampton and Stoke-on-Trent. A copy of the focus group guide is provided in [Appendix 3](#).
- The research team also conducted telephone interviews with a sample of 96 businesses and business leaders across the six locations. The purpose of the interviews was to gather their views on the importance of the arts and cultural offer within a place in: attracting and retaining employees; enhancing their reputation; inviting inward-investment; and more generally, influencing their ability to undertake more business. Details on the profile of businesses consulted is provided in [Appendix 4](#).
- Additional interviews were completed with a number of strategic partners including representatives from local council inward investment teams, Chambers of Commerce, Business Improvement Districts and regional growth companies. A list of contributors to the research is provided in [Appendix 5](#).

One of the challenges encountered in delivering the research is the lack of consensus on what is included within a local arts and cultural offer. Whilst the national survey incorporated definitions of cultural events and activities as included within the [Active Lives Survey](#)<sup>4</sup>, for the focus groups and business consultations the notion of a local arts and cultural offer was left open to interpretation by the research participant.

There is merit in further exploration by Arts Council England and partners, in particular given frequent reference to cultural heritage and the built environment by research participants, and also the inter-weaving of arts and cultural events along with food markets and business networking events by local partnerships including Business Improvement Districts and Chambers of Commerce.

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<sup>4</sup> The Active Lives Survey explores participation in leisure and recreational activities, including sport, physical activity and culture. The survey is led by Sport England in partnership with the Arts Council, Public Health England and Department for Transport.

## 3 Creating desirable places to live

### Headline findings

- **A strong and vibrant arts and cultural offer provides opportunities for communities to come together. It contributes towards people having a stronger attachment to place by fostering a sense of collective identity.**
- **People who viewed a sense of community as being important to them were most likely to agree that attending arts and culture events helped them feel part of their community.**
- **Arts and culture supports personal wellbeing and a strong arts and cultural offer makes people feel more content and thus more likely to stay within an area.**
- **The research suggests that some people find it difficult to find out information about arts and cultural activities and events, which can result in them underestimating the diversity and strength of their local arts and cultural offer.**
- **Accounting for a range of factors that influence life satisfaction, people attending a wider range of arts and cultural events are more satisfied with their lives than people who don't.**

### 3.1 Building stronger communities

The notion of place-shaping as an ambition for and approach to local governance has received considerable attention over the last 15 years. The Lyons Inquiry into local government<sup>5</sup> and the earlier Local Government White Paper 'Strong and Prosperous Communities'<sup>6</sup> both explored the role of local government in the 21st century. The Lyons Inquiry concluded that although some economic and sociological analyses have challenged the importance of place and the importance of the local in modern society and economics, place remains relevant. Furthermore the Inquiry report states that arguments for a local role in determining the actions of government and the provision of public services are becoming stronger.

The term 'place-shaping' is defined within The Lyons Inquiry report as the '*creative use of powers and influence to promote the general well-being of a community and its citizens.*' Place-shaping is now widely understood to describe the ways in which local partners collectively use their influence, powers, creativity and abilities to create attractive, prosperous and safe communities, places where people want to live, work and do business.

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<sup>5</sup> Lyons, M. (2007) 'Lyons Inquiry into Local Government. Place-shaping: a shared ambition for the future of local government'

<sup>6</sup> Department for Communities and Local Government (2006) 'Strong and prosperous communities: The Local Government White Paper'

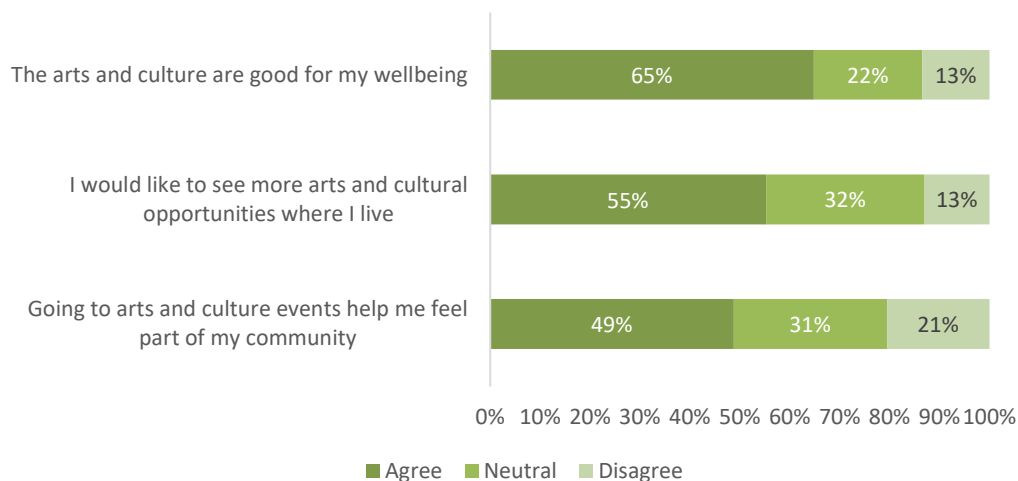
The Department for Digital, Culture, Media & Sport<sup>7</sup> 2016 White Paper on culture appeared to signal the UK Government’s desire to establish a more diverse arts and culture industry, seeking to better distribute the benefits to more disadvantaged backgrounds.<sup>8</sup> It also appeared to signal a desire to achieve a more community inspired approach to arts and cultural activities. Interest in the role of arts and cultural activities in ‘place-shaping’ has grown, leading to important work that suggests such a role should be seen within a broader ‘ecosystem’ of policy interventions and outcomes. This is closely linked with an interest in the role of arts and culture in the wellbeing agenda and how this impacts place.<sup>9 10</sup>

### 3.1.1 Importance of arts and culture to people’s lives

The national survey findings reveal that two-thirds of respondents agreed that arts and culture has positive benefits for their personal wellbeing and just over half (55 per cent) stated that they would like to see more opportunities in their area (Figure 3.1). A similar proportion (49 per cent) also agreed that going to arts and culture events helped them to feel part of their community.

However, respondents were less likely to agree that the arts and culture offer in their community is having an impact on the area. This may be explained by a lack of awareness of the extent or impact of their local arts and culture offer or simply because their local offer is not particularly strong. Half of the sample disagreed with the statement ‘*I don’t really pay attention to the arts and cultural activities in my area,*’ which suggests that there is latent support within many communities for arts and cultural engagement.

Figure 3.1: Views on impact of the local arts and cultural offer in their community



When considering the relationship that respondents feel to arts and culture and the impact that they are perceived to have on the local area there were mixed results, with an almost equal split among respondents between having an impact, neutral and having no impact (Figure 3.2).

<sup>7</sup> Now known as the Department for Digital, Culture, Media and Sport.

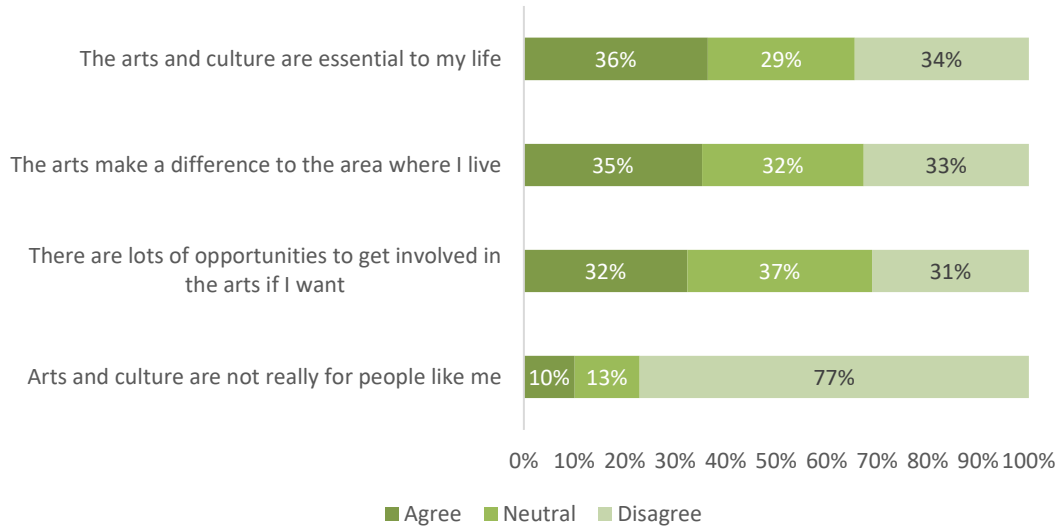
<sup>8</sup> DCMS (2016) ‘The Culture White Paper’ London: MH Government.

<sup>9</sup> LGA and All-Party Parliamentary Group on Arts, Health and Wellbeing (July 2017). Policy Briefing: Local Government Support for Health and Wellbeing through the Arts and Culture. London: LGA

<sup>10</sup> LGA and CLOA (2017). People, culture, place: The role of culture in placemaking. London: LGA.

Over three quarters (77 per cent) disagreed with the statement that ‘arts and culture is not really for people like me,’ which highlights the broad appeal of a strong local arts and cultural offer. However, one third (31 per cent) of survey respondents disagreed that there were lots of opportunities to get involved in the arts in their area, which may be due to a lack of awareness of their local arts and culture offer or a relative lack of provision.

**Figure 3.2: Relationship to arts and culture in their area**



A common theme from both the focus group discussions and business consultations was the difficulty in trying to find out information about arts and cultural activities and events. For some this led them to underestimate the diversity and strength of their local arts and cultural offer. In other words, the lack of visibility or poor promotion of the local arts and cultural offer meant that people were less able to engage in local events and activities and thus realise the positive social, community and wellbeing outcomes that such participation can bring.

The focus groups also indicated that local people’s perception of the arts and cultural offering is dependent on their own exposure to arts and culture. In other words, focus group participants who are themselves involved in arts and culture-based activities and events locally more commonly described their local area as having a good arts and culture offering.

*‘The art is so accessible. It is very inclusive and is made perhaps by people you know. It is made by people like you. There is nothing off-putting about it.’ (Hastings)*

*‘I think that for people that are creative there are opportunities for people to participate with craft activities and singing. There are lots of opportunities for being involved. I think that is out there and these are promoted online and is more for people who are on social media but for the people who don't have access to use that facility it isn't that straightforward we are not very good at selling what we do.’ (Redruth)*

Another theme highlighted through the focus groups was that the local arts and cultural offer was often too centralised, which presented challenges in terms of access and also missed opportunities for participation to build social capital and a sense of community away from town or city centre locations. Whilst this was a particular issue in the larger urban areas of Birmingham, Stoke-on Trent and Southampton, it was also relevant to the towns of Hastings, Redruth and Halifax.

## 3.2 Fostering community cohesion

There is growing interest in the role of community-based arts programmes in achieving personal, social, and educational, as well as economic changes in disadvantaged communities<sup>11</sup> and in using arts and culture to bring communities together.<sup>12</sup> An emerging theme in Wales is exploring the use of arts and culture to help tackle poverty on a place-based model. This has led to the Fusion programme, aimed at utilising arts and culture to address broader wellbeing objectives surrounding poverty eradication.<sup>13</sup> In England evidence from the Creative People & Places (CPP) programme suggests that targeted investment in local places is contributing to an increased sense of belonging in communities by inviting people to choose, create and take part in art experiences where they live.<sup>14</sup>

Analysis of the national survey reveals that people who viewed a sense of community as being important to them were most likely to agree that attending arts and culture events helped them feel part of their community (Figure 3.3). Sixty-eight per cent of those who say that a sense of community is very important to them agree that attending arts and culture events helped them feel part of their community, compared to 30 per cent of those who see a sense of community as very unimportant.

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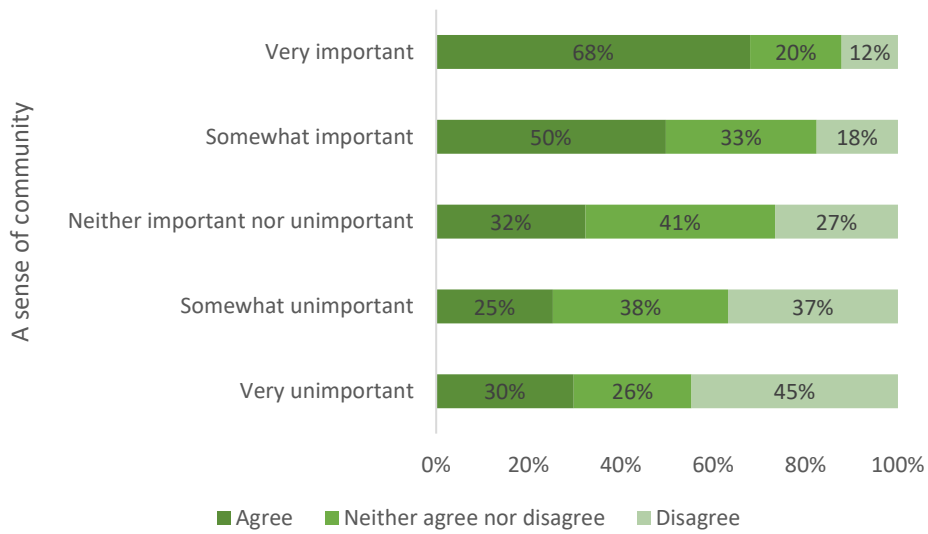
<sup>11</sup> Newman, T., Curtis, K. and Stephens, J. (2001) 'Do community-based arts projects result in social gains? A review of literature. Ilford'. Barnardos.

<sup>12</sup> Arts Council England (2017) 'Arts and Communities Programme Report'. Report prepared by Consilium Research & Consultancy.

<sup>13</sup> Andrews, K. (2014) 'Culture and Poverty: Harnessing the power of the arts, culture and heritage to promote social justice in Wales'. Cardiff: Welsh Government.

<sup>14</sup> ECORYS (2017) 'Creative People and Places: End of Year 3 Evaluation Report.'

**Figure 3.3: Relationship between views on a sense of community and arts and culture**



The most prominent factor that survey respondents cited for their comments about their area getting better was in relation to the community groups and events on offer in the area. Events such as festivals, parades and theatre plays were just some of the examples given. In general, the interviewees commented that these groups and events helped to foster a strong sense of community and identity.

Within all focus groups, the importance of arts and culture was highlighted in relation to community integration. A strong and vibrant arts and cultural offer was seen as integral to providing opportunities for communities to come together, fostering a sense of collective identity, space for interaction and shared experience and thus contributing towards people having a stronger attachment to place.

*‘It is absolutely vital. There is the aspect that art is for everybody. But, from the point of the artists themselves, there is a bit, about being included in the community. And here they are doing something about it.’ (Hastings)*

*‘Generally, I think our culture makes us who we are. [...] There are people coming into Cornwall who have no idea that we have a distinct and separate cultural identity and unless we address the problem our distinctive and vibrant culture will diminish. Because people are not getting the information.’ (Redruth)*

*‘Yes, the music sessions were focused on children and it did bring children from different schools together. Last year was the first year we did the Lantern parade and certainly in the workshops we brought different people together.’ (Stoke-on Trent)*



Participation and engagement were valuable in that it could foster a stronger sense of community, identity and belonging which for many made places more attractive to live. As such, this highlights the potential for a strong arts and cultural offer to make people feel happier with where they live by promoting inclusion and also celebrating diversity. This also has the potential to make people feel more settled in where they live and thus facilitating employer efforts to retain workers.

## 4 Attracting and retaining people to live and work

### Headline findings

- Arts and culture was cited as an equal priority to ‘schools’ in people’s decision to move to, or remain in an area. These findings support a notion that a strong local arts and cultural offer can play a role in attracting and retaining workers.
- The arts and cultural offer as a pull factor is equally important to someone employed in a high-skilled job as someone seeking employment in a lower skilled role.
- Respondents who live in an area with more cultural assets are more likely to be satisfied with their local area as a place to live, which can contribute towards worker retention rates.
- Arts and cultural assets are a vital ingredient as to whether people are more likely to be satisfied about the communities and places within which they live.
- Arts and culture is important in supporting community integration. Participation and engagement can foster a stronger sense of community, identity and belonging which makes places more attractive to live.
- A strong arts and cultural offer helps businesses to sell the benefits of moving to an area in relation to improved quality of life and encouraging a positive work and life balance.

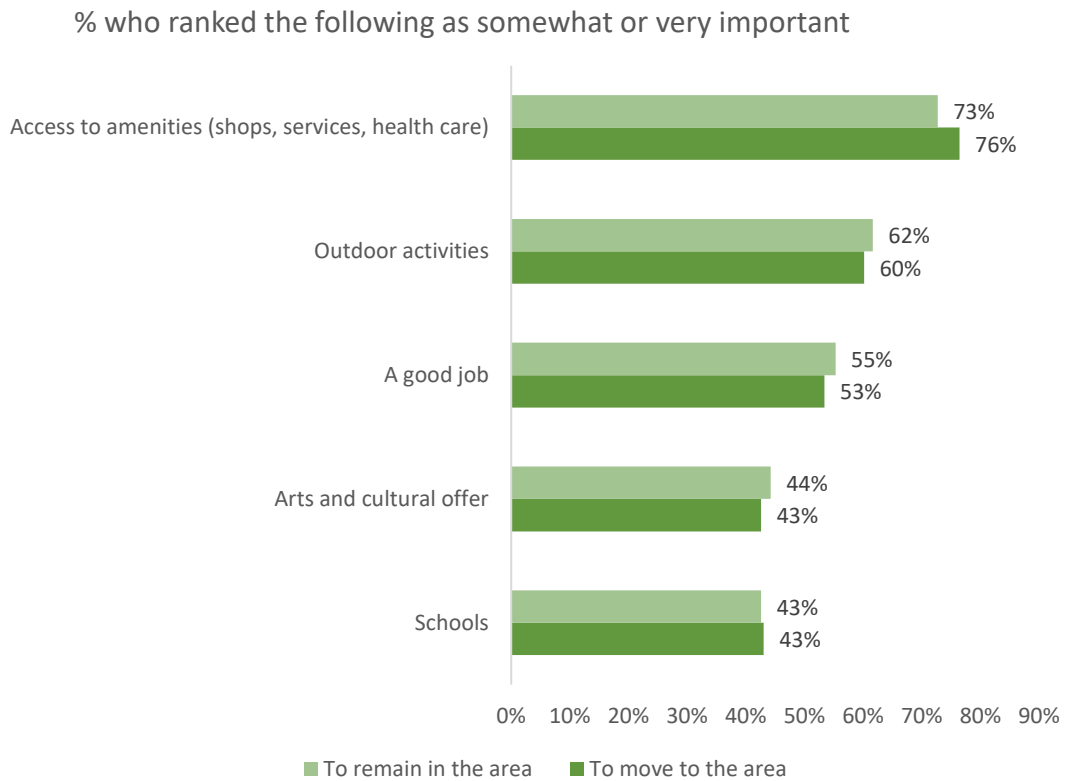
### 4.1 Attracting and retaining workers

One of the key objectives for this research was to determine whether and to what extent a strong arts and cultural offer within a place attracts more people to live and work and helps to retain workers. Evidence from the national survey suggests that arts and culture is a factor both for people considering moving to an area and for people remaining within an area.

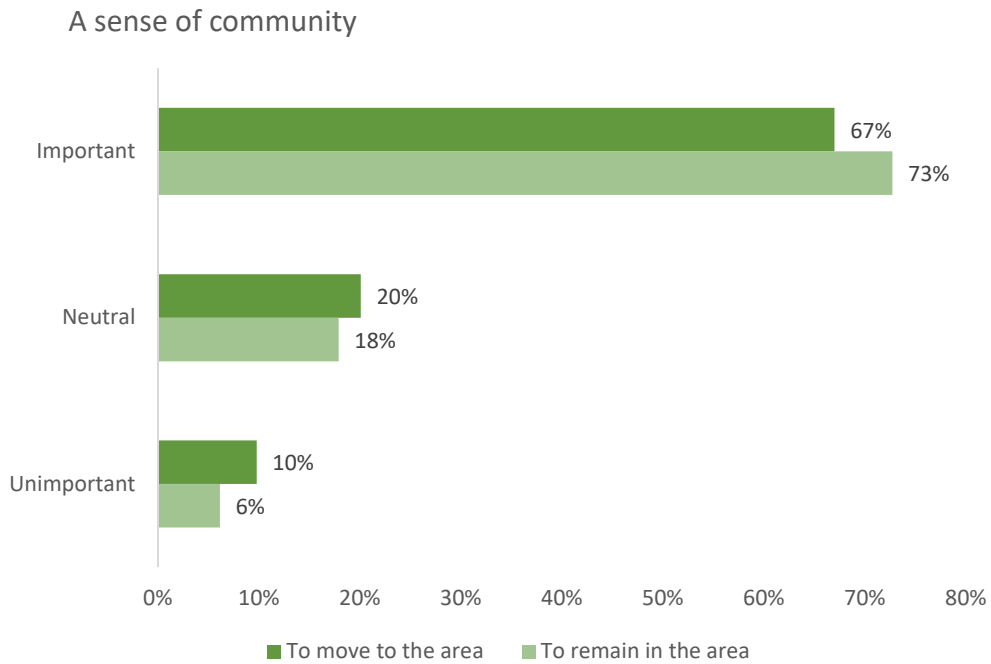
Arts and culture was cited as an equal priority to ‘schools’ in people’s decision to move to, or remain in an area. Some 44 per cent of respondents that had remained in their area and 43 per cent of those who had moved into their area said that the local arts and cultural offer was either somewhat or very important to their decision (Figure 4.1).

Having a sense of community is also highlighted as a strong influencing factor in both attracting people to move to an area and encouraging people to stay within an area (Figure 4.2). This highlights the importance of the role that arts and culture can provide in creating a stronger sense of community by providing opportunities for people to come together.

**Figure 4.1: Push and pull factors for people moving to or staying in an area**

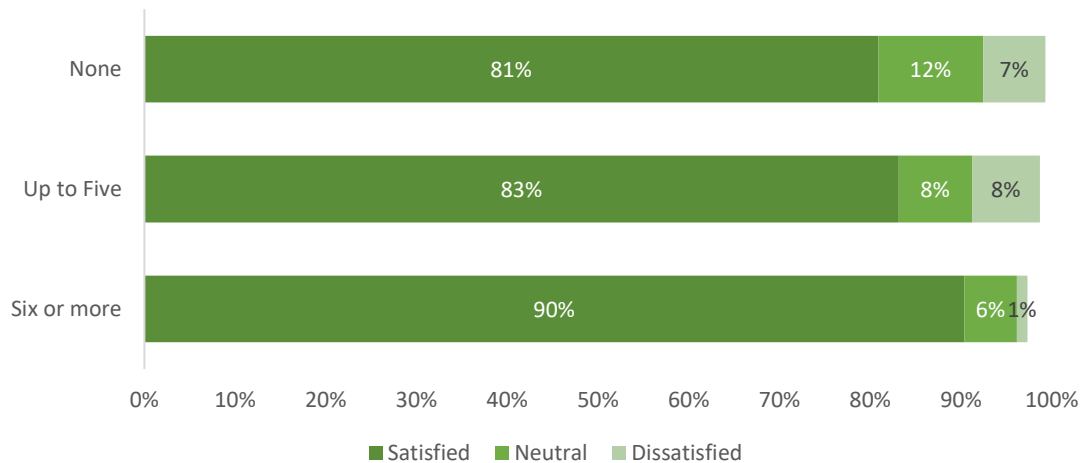


**Figure 4.2: Relative importance of a sense of community as a push or pull factor**



Respondents who live in an area which has more cultural assets are slightly more likely to be satisfied with the services and amenities in their local area (Figure 4.3). They are also slightly more likely to be more satisfied with their local area as a place to live generally. This relationship is slightly more evident when comparing satisfaction with their local area to the number of different types of cultural events they attended in the last 12 months.

**Figure 4.3: Correlation between number of cultural assets and satisfaction with place**



To provide insight, a series of multivariate analyses were performed on each of the pull-factors included in Figure 4.1 testing for possible correlation with the number of cultural assets in a community displayed in Figure 4.3, while controlling for socio-demographic and place-based factors.<sup>15</sup> The results of these analyses are displayed in [Appendix 1](#).

What the multivariate analysis demonstrates is a clear connection between the importance of arts and culture in making place-based choices and the number of arts and cultural assets in the areas where respondents live. This influence of a strong arts and cultural offer was more significant for females, which may have particular relevance for sectors/employers where females make up a higher proportion of the workforce. Put another way, people who say that arts and culture is an important component of their choice to live or remain in an area – almost half the population (from Figure 4.1) – are more likely, all other things being equal, to actually be based in an area with a higher number of arts and culture assets.

Perhaps just as importantly, the analysis found no correlation based on employment status, IMD<sup>16</sup> ranking, NS-SEC<sup>17</sup> or Arts Council England region. In other words, the arts and cultural offer as a pull factor is equally important to someone employed in a high-skilled job as to someone seeking employment in a lower skilled role. What this means is that a strong arts and cultural offer can help a broad range of employers to attract workers.

<sup>15</sup> General amenities, community, and outdoor activities are omitted from the overall model performance was low.

<sup>16</sup> <https://www.gov.uk/government/statistics/english-indices-of-deprivation-2015>

<sup>17</sup> The NS-SEC is an occupationally based classification. See [www.ons.gov.uk](http://www.ons.gov.uk)

The analysis also highlights that people living in areas with more cultural assets are more likely to agree that arts and culture were important in their decision on where to move to or live. This may suggest that areas wishing to attract people from towns and cities with a strong arts and cultural offer have to promote their own offer explicitly as part of effective place marketing strategies.

Feedback from local businesses across the six localities varied in terms of the importance they attached to the role of the local arts and cultural offer in helping to attract and retain people to live and work. Where businesses thought that arts and culture did have an impact on their ability to attract and retain workers, this was usually with the caveat that it depended on the industry the business operated in (e.g. creative industries or employers with connections to the cultural sector) or the job roles being considered.

*'The more arts events and cultural opportunities there are in a place the more attractive it is. Higher skilled staff tend to be more educated and expect a greater variety of culture to keep them entertained. But retaining higher skilled staff requires higher wages and this is the most important factor for most people.'* **(Hastings)**

*'Having a vibrant offer helps bring people and skills to the area, which would in turn make businesses consider coming to Hastings. An attractive area attracts cultured and educated individuals especially.'* **(Hastings)**

For many businesses other factors were regarded as of greater importance when attracting workers including job remuneration, the quality of local schools, transport infrastructure and the affordability and quality of local housing and local amenities.

The national survey results provide further evidence that there is a strong link between the satisfaction with the arts and culture offer in a particular location and the actual number of arts and culture amenities. Both the number of general amenities and the number of arts and culture assets are strongly correlated with the level of satisfaction with the local services and amenities in places where respondents live. However, when asked about satisfaction with arts and culture assets, the only variable correlated with it is the number of those assets in the places where respondents live.

Equally, when respondents were asked about their general satisfaction with their local area as a place to live and work, both the number of general amenities and the number of arts and culture assets are correlated with it. In other words, arts and cultural assets are a vital ingredient, controlling for all other explanatory factors (socio-demographics, place-based factors) as to whether people are more likely to be satisfied about the communities and places within which they live.

However, there is recognition that a strong arts and cultural offer helps businesses to sell the benefits of moving to an area in relation to improved quality of life and encouraging a positive work and life balance.

*'The town does have a good variety of arts and culture on offer but tends to be seen as a place for people to come to once their working lives have come to an end as the pace is a lot less hectic. I also feel that workers will prioritise wages and living costs over any other factor when deciding to move somewhere with arts and culture only being an extra bonus.'* **(Hastings)**

A number of businesses emphasised that a strong arts and cultural offer was particularly important for attracting young professionals and graduates as well as raising the profile of places to skilled workers from overseas.

*'In my former life before human resources I was a recruiter for accountants and finance people in Southampton for about 15 years, so yes I think it does have an impact, in essence what we're trying to do is attract young professionals I would say and for them to have something to do and access to culture I think is really important.'* **(Southampton)**

Several businesses referenced recent and/or ongoing capital developments in their local area which had or would provide a platform from which a stronger arts and cultural offer could develop – such as the [Piece Hall](#) in Halifax, [Symphony Hall](#) in Birmingham and Hasting's Pier. Public realm improvements and works to restore key civic buildings as well as promoting local heritage were all regarded as important in engendering confidence and enabling places to compete with neighbouring centres. Such developments were often designed to provide a space for high profile outdoor performances, events and festivals.

However, one of the themes outlined by businesses and local people was the importance of achieving an appropriate balance to ensure that any investment in local regeneration and improving the local arts and cultural offer did not serve to weaken community bonds and limit participation due to rising costs. The majority of focus group participants felt that their local arts and cultural offer (in particular local festivals) was more focused on supporting the visitor economy and tourism as opposed to being specifically focused on promoting the area as a place to live.

It was suggested by some participants that further efforts needed to be directed at hosting events and activities within the heart of local communities to make these areas more attractive places to live. For many residents the lack of affordable transport routes and/or poor transport connectivity created barriers in them accessing their local arts and cultural offer within the centre of their town or city.

*'We have a lot of festivals with two big festivals in the summer. Jazz and punk as it's called and another festival; also if you came on market day there is an arts market. Also, there is a week-long festival called the Mosley Festival that used to involve street parades.'*

**(Birmingham)**

*'If you are a visitor for the day perhaps looking at family history, it is a lovely place to come, people are being friendly. They are happy, the architecture is worth getting out of the car for. They don't bring any of the baggage of the other people. And for the visitor it is a great experience for them.'* **(Redruth)**

## 4.2 Accessing the local arts and cultural offer

Within all focus groups participation and engagement in arts and culture was highlighted as valuable in that it could foster a stronger sense of community, identity and belonging which for many made places more attractive to live. However, focus group participants acknowledged the funding pressures facing their local arts and cultural offer and more broadly the rising cost of living for many people which was creating challenges in terms of access to and affordability of arts and cultural opportunities.

*'Cost is an issue [...] if you asked around the table how many people can really afford to go there. If you look at something in the park [there] is a huge mixture of people, I was there yesterday, and it was heaving. But when you look at the MAC things are always very costly, I love the MAC, I am a jazz fan and its jazz is fantastic, but it is the cost.'*

**(Birmingham)**

*'People were more willing to get on board due to the City of Culture bid. Everybody is strapped for cash, everybody is knackered, and it is hard. We put together a pop-up cinema in an alleyway and seeing something creative in a normal place just changes your day. I know the kids around here really cared about it. Talking to children, they said after primary school they miss the creativity and they are under so much pressure.'* **(Stoke)**

*'I think it definitely divides between the generations. For example, when we got the Jerwood [gallery], it seems it was built for people from London. It was built on the coach park. It was a place where the fishing boats landed but now it has all been made posh. There is still a big split there even now. The mention of Jerwood gets [a] mixed reaction.'*

**(Hastings)**

A common concern raised by focus group participants was around a perceived lack of opportunities for young people, which could make areas less attractive places to live, both for families with young children and for young professionals starting on their careers. For some, the absence of a strong arts and cultural offer has negative consequences in terms of fostering negative perceptions amongst young people on the creativity and opportunity in their community. Several focus group participants suggested that a strong arts and cultural offer has the potential to inspire and engage young people to consider different career pathways and be more entrepreneurial. However, for some there was a wider context around a lack of employment opportunities generally which was of greater concern than the relative strengths of the local arts and cultural offer.

*'This is where I feel there is an opportunity. This is apparently an area of the lowest skills, there is the least opportunity for young people. Young people will not stay here, when the opportunities are elsewhere. We need businesses, we need people to employ. That is what we need, and we need to see some kind of movement, otherwise we will stagnate. People cannot be here with no jobs, no opportunity.'* **(Hastings)**

*'This is about opportunity. If that area had more opportunities and more creativity, then they would give the children more time to invest time in those skills. At the moment there are few creative jobs and opportunities in this area and so parents focus on getting their kids to learn the basics as anything else they will think of as fruitless.'* **(Stoke-on-Trent)**



# 5 Place marketing, inward investment and economic growth

## 5.1 Supporting economic growth

### Headline findings

- **A strong arts and cultural offer can help to attract creative entrepreneurs and enterprises. As the creative industries are characterised by a younger workforce, location decisions more likely to be influenced by places where the local arts and cultural offer is regarded as strong, vibrant and growing.**
- **A strong arts and cultural offer is recognised as playing an important role in attracting and retaining talent, in particular graduate companies in the digital and creative industries.**

A number of research studies have highlighted the local economic impact of arts and culture, including references to financial return on investment,<sup>18</sup> regional performance<sup>19</sup> or of contribution to overall UK economic performance.<sup>20</sup> Whilst consultations with businesses and strategic partners highlighted the difficulty of measuring the contribution of a stronger arts and cultural offer to economic growth and GVA, several contributors emphasised the importance and potential of a strong arts and cultural offer in helping to grow their visitor economy and creative industries sector.

A number of recent research reports have highlighted the role of the creative industries in boosting local economies. Research by Nesta<sup>21</sup> in 2016 referenced the fact that local economies in the UK have grown their creative industries by an average of 11 per cent between 2011-14 and 2015-16, twice as fast as other industry sectors.

Creative industries<sup>22</sup> feature prominently in the government's current Industrial Strategy. The government and the creative industries sector, through the Creative Industries Council (CIC), have agreed a Sector Deal to unlock growth for creative businesses.<sup>23</sup> The Sector Deal will invest more than £150 million across the lifecycle of creative businesses to stimulate growth, jobs, innovation and new businesses in all parts of the UK.

<sup>18</sup> AMION and Locum Consulting (2010) 'Impact of Historic Environment Regeneration' Swindon: English Heritage

<sup>19</sup> Morris Hargreaves McIntyre (2009) 'Cultural Impact Study: Evaluating Birmingham's cultural sector' Manchester: Morris Hargreaves McIntyre

<sup>20</sup> Cebr (2015) 'Contribution of the arts and culture industry to the national economy' Birmingham: Arts Council England

<sup>21</sup> Nesta (2018) 'Creative Nation: How the creative industries are powering the UK's nations and regions'

<sup>22</sup> Includes film, TV, music, fashion and design, arts, architecture, publishing, advertising, video games and crafts.

<sup>23</sup> HM Government (2018) 'Industrial Strategy: Creative Industries Sector Deal'

Research by the Creative Industries Federation<sup>24</sup> highlights that creative enterprises not only generate considerable gross value added for the UK economy, but also drive and unlock innovation, deliver significant social impact, and invest heavily in the regeneration of communities. The research also highlights that 95 per cent of creative industry businesses are micro businesses (fewer than 10 employees) and 35 per cent of creative workers are self-employed (compared with 15 per cent across the workforce as a whole).

A strong arts and cultural offer was emphasised by several contributors as important in attracting creative entrepreneurs and enterprises who, given their size, can be more flexible in their location decisions. As the creative industries are characterised by a younger workforce, location decisions (both professionally and personally) are more likely to be influenced by places where the local arts and cultural offer is regarded as strong, vibrant and growing. There are positive examples from within the locations included in this research of growth within the creative industries sector.

The most recent annual survey of the UK's tech economy<sup>25</sup> published by Tech Nation, identified Redruth and Truro as tech hotspots with digital tech businesses in their cluster having a turnover of £50 million, an increase of 32 per cent since 2014, generating £93.4 million for the local economy in GVA. The report specifically references Cornwall's strong sense of community and quality of life of its residents as being an important draw for businesses. These factors, as well as the links between the tech sector and local arts and cultural organisations, are recognised as important by the Cornwall and Isles of Scilly LEP and inward investment bodies such as Invest in Cornwall as supporting further growth in this sector.

In Stoke-on-Trent a new moving image cluster, Platform,<sup>26</sup> has been launched to develop the moving image economy, drive innovation, and promote the area as a destination for production, investment and creative talent. The cluster aims to offer targeted and practical assistance for Staffordshire's film, TV, games and animation companies ranging from finance, skills and technical and creative development. A strong arts and cultural offer is recognised as playing an important role in attracting and retaining talent, in particular graduate companies in the digital and creative industries.

Several contributors referenced the recent bidding process to attract the new Channel 4 national HQ and smaller creative hubs. Birmingham was unsuccessful in their bid for the national HQ (which was awarded to Leeds) and Stoke-on-Trent was unsuccessful in their bid to host one of the creative hubs (which were awarded to Glasgow and Bristol). However, there is increasing interest amongst inward investment teams in understanding how they can improve their competitiveness in terms of attracting business relocations and the contribution that a stronger arts and cultural offer can play.

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<sup>24</sup> Creative Industries Federation (2018) 'Growing the UK's Creative Industries, what creative enterprises need to thrive and grow'

<sup>25</sup> <https://technation.io/insights/report-2018/truro-redruth/>

<sup>26</sup> The sector led cluster is working in partnership with the Stoke-on-Trent and Staffordshire Local Enterprise Partnership, Stoke-on-Trent City Council, Staffordshire Chambers of Commerce, Creative England, and the Department for International Trade, along with Staffordshire and Keele Universities.

The recently announced [Cultural Development Fund](#) in England, which aims to allow cities and towns<sup>27</sup> to invest in creative, cultural and heritage initiatives that lead to culture-led economic growth and productivity, provides one example of an approach which has the potential to generate evidence of the contribution that arts and culture can play in place-shaping.

## 5.2 Place marketing and inward investment

### Headline findings

- **Most businesses consulted agreed that a rich cultural offer provides benefits in terms of branding, identity and reputation. Regular events and high-profile arts activities provide opportunities to promote businesses to a larger audience.**
- **Positive media coverage of arts and cultural activities is important in putting places ‘on the map’ and, where necessary, challenging and changing negative perceptions and media stereotypes of the attractiveness of areas as places to live, work and visit.**
- **Consultations with representatives from local councils, Chambers of Commerce, Business Improvement Districts and Inward Investment Companies has emphasised the importance of a strong arts and cultural offer in supporting place branding and marketing activities.**

The Local Government Association emphasises the importance of local councils collaborating with communities to emphasise their cultural character and create a collective place brand which enables town and city centres to be distinguished from the functionality of retail parks or shopping online.<sup>28</sup> They also highlight the central role that events can play in engaging the local community and growing the visitor economy.

Consultations undertaken with representatives from local councils, Chambers of Commerce, Business Improvement Districts and Inward Investment Companies has emphasised the importance of a strong arts and cultural offer in supporting place branding and marketing activities.

Consistent with previous research,<sup>29</sup> a common theme expressed by these contributors was the link between the positive media coverage of arts and cultural activities and its impact on external perceptions of a place. This was highlighted as an important step in putting places ‘on the map’ and, where necessary, challenging and changing negative perceptions and media stereotypes on the attractiveness of areas as places to live, work and visit. New or renovated cultural venues also formed an integral part of place marketing, enabling Chambers of Commerce, Inward Investment Companies and Destination Management Organisations to redefine their local identity.

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<sup>27</sup> The fund is open to towns and cities outside of London who want to make the most of culture’s contribution to their local economy.

<sup>28</sup> <https://www.local.gov.uk/topics/economic-growth/revitalising-town-centres-toolkit-councils/function/place-branding-and>

<sup>29</sup> ECORYS (2014) ‘Local Economic Impacts from Cultural Sector Investments’ London: HM Government

Consultations also highlighted the value of a strong and vibrant local arts and cultural offer in celebrating the cultural heritage and identity of a place and its uniqueness. This provided potential benefits in terms of raising the profile of areas to business owners seeking to relocate their business to achieve a better quality of life (both for themselves and their workforce). Community festivals, such as the [St Piran's Festival](#) in Redruth, [Hastings Old Town Festival](#), the [Big Feast Festival](#) in Stoke-on-Trent and the new [Wellbeing & Community Festival](#) in Halifax, helped to raise their profile and emphasise their cultural character. Their contribution to place marketing was intrinsically linked to the effectiveness of their promotion and ability to portray a positive image, both locally and to wider audiences.

Some businesses highlighted the importance of an area's profile in helping businesses to compete with other urban centres, albeit the role of arts and culture was somewhat intangible and tied up with broader issues around place identity.

*'I think Birmingham desperately needs an innovative focal point and showcase building to exhibit modern contemporary visual arts. As a city we do not currently have this and so we are falling further behind places like London, Liverpool and Manchester. This type of space shows that [a] city is forward thinking and willing to embrace new ideas and attracts new and innovative businesses.'* **(Birmingham)**

Barriers to attracting investment, in particular from overseas, largely involve perceived weaknesses in transport and logistics infrastructure, access to a skilled workforce and investment in research and development capacity. However, at a UK wide level, the most recent Attractiveness Survey, which examines the evolving performance and perceptions of the UK as a destination for foreign direct investment (FDI), reports on a decline in the UK's qualitative appeal due to a fall in perceptions of stability in the social climate, quality of life, diversity and the political environment.<sup>30</sup>

Such variations in investor perceptions of a place are also likely to influence investment decisions on a regional and local basis and as such perhaps demonstrate the role that a strong and well promoted arts and cultural offer can play in addressing some of these qualitative aspects. Reversing negative perceptions and media stereotypes was highlighted by both focus group participants and representatives from the business community as important in attracting investment and visitors.

Reference was made to the experiences of cities chosen as part of the European Capital of Culture or UK Cities of Culture programmes. For example, emerging evidence from Hull's experience as UK Capital of Culture<sup>31</sup> suggests that:

- The programme has positively changed perceptions of Hull
- Residents are more likely to speak confidently about Hull as a result of the programme
- The programme attracted significant investment in public realm improvements

<sup>30</sup> EY (2018) 'In transition: EY's Attractiveness Survey UK' June 2018

<sup>31</sup> University of Hull (2018) 'Cultural Transformations: The impacts of Hull UK City of Culture 2017 – Preliminary Outcomes Evaluation' March 2018

- Three-quarters of visitors to Hull in 2017 said it changed their perception of the city for the better
- Sixty-one per cent of those who visited Hull in 2017 said they were likely or very likely to return
- The programme achieved at least £22 million total projected gross value added to local economy
- The programme led to a 9 per cent increase in the confidence of residents to take part or join in with cultural and non-cultural activities.

Proposals for the creation of a UK ‘Town of Culture’ award have grown in support in light of the positive impacts experienced by previous cities of culture to assist smaller urban areas in raising their profile, attracting investment and strengthening their local arts and cultural offer.<sup>32</sup>

Whilst the bid to become the 2021 UK City of Culture submitted by Stoke-on-Trent was ultimately unsuccessful,<sup>33</sup> the process of drawing together the bid helped to generate confidence, raise the profile of the existing arts and cultural offer, engage and galvanise communities and engender a strong sense of civic pride. It has generated momentum which local partners were keen to build upon to continue to raise the profile of the city.

*‘Yes, 100 per cent, it should attract business and fundamentally make the area more attractive, it also gives the impression that an area respects itself and its historical and cultural heritage.’ (Stoke-on Trent)*

*‘It has a halo effect so that’s for benefit, it’s just like saying if a place is known for being creative and artistic it washes off on other businesses all round.’ (Hastings)*

One of the challenges highlighted during consultations was one of coordinating activities around place marketing and facilitating partnership links between inward investment teams, local business and the arts and cultural sector.

There are a range of organisations and institutions with a stake in place marketing activities, often operating at different geographical levels. These may include:

- Arts development teams
- Economic development teams
- Inward investment organisations
- Chambers of Commerce
- Business Improvement Districts
- Local arts and cultural organisations
- Destination Management Organisations
- Local Enterprise Partnerships.

<sup>32</sup> <https://www.theguardian.com/commentisfree/2018/dec/30/the-guardian-view-on-yvette-coopers-town-of-culture-proposal-a-fine-idea>

<sup>33</sup> Coventry was selected as the 2012 City of Culture.

Initiatives such as the UK City of Culture, the Great Places<sup>34</sup> scheme, the Creative People and Places programme and the Cultural Development Fund are beneficial in that they have the potential to bring partners together. However, funding cuts has led to significant downsizing and even closure of many local authority arts development teams,<sup>35</sup> thus presenting challenges in developing partnership approaches to place marketing activities that capitalise on the existing local arts and cultural offer.

### 5.3 Benefits for the high street

#### Headline findings

- **There are positive examples from across the UK of towns and cities that are successfully transforming their high streets through the growth of high-quality visitor experiences, increasing integration of service industries into the retail mix and by fundamentally having a better understanding of people's need to visit towns and cities for far more than just 'shopping'.**
- **A strong arts and cultural offer can support efforts to maintain or enhance the attractiveness of retail centres as places to live, work and visit by offering unique experiences for visitors and/or shoppers through the animation of public spaces including art works, live performances and opportunities for local cultural identity to be explored and celebrated.**
- **The most recent survey of Business Improvement Districts acknowledges the role of culture and arts as an innovation tool and in helping to attract visitors and increase footfall.**
- **Several contributors highlighted that aspirations to grow and strengthen their local arts and cultural offer were linked to local plans to increase residential accommodation in towns and city centres. This growth is largely fuelled by young people, in particular single professionals and the growth of the student population.**
- **Contributors highlighted the potential opportunities arising from the recently announced Future High Streets Fund which was launched to help local areas respond to and adapt to changes in the high street.**

There were 5,855 shop closures in Britain in 2017, the highest figure since 2010.<sup>36</sup> Town centre vacancy rates are at around 10 per cent and footfall levels are falling by 3 per cent year-on-year. Online shopping has become significantly more popular than it was 10 years ago. Between 2007 and 2018 online sales increased six-fold while growth of in-store sales has lagged behind. In 2000 online retailing accounted for less than 1 per cent of retail sales while in August 2018 almost a fifth of all retail sales took place online.<sup>37</sup>

<sup>34</sup> The Great Place Scheme is a joint initiative by the Heritage Lottery Fund, Arts Council England and Historic England to put arts and culture at the heart of their communities.

<sup>35</sup> <https://www.artsprofessional.co.uk/pulse/survey-report/>

<sup>36</sup> <https://www.pwc.co.uk/press-room/press-releases/store-openings-at-lowest-level-in-seven-years-as-digital-demands-andappetite-for-experiences-continue-to-redefine-british-high-streets.html>

<sup>37</sup> Office for National Statistics

In response to increasing concerns around the future of the high street, the Ministry of Housing, Communities and Local Government (MHCLG) Committee of the House of Commons is undertaking an inquiry on the future of England's high streets and town centres in 2030.<sup>38</sup> The second edition of the Grimsey Review into the vanishing high street<sup>39</sup> calls for all towns to develop plans that are business-like and focused on transforming places into complete community hubs incorporating health, housing, arts, education, entertainment, leisure, business/office space, as well as some shops, while developing a unique selling proposition.

There are positive examples from across the UK of towns and cities that are successfully transforming their high streets through the growth of high-quality visitor experiences, increasing integration of service industries into the retail mix, and by fundamentally having a better understanding of people's need to visit towns and cities for far more than just 'shopping'. Wantage in Oxfordshire helped to revive the town by organising live public performances in their Market Place on summer Saturday mornings, hosting community events along with arts displays in shops which helped to attract people into the town centre.<sup>40</sup> Newcastle-under-Lyme BID, winner of the British BIDS Place Marketing Award in 2018, delivered Homecoming 2018. This was a series of events linked with the UK-wide celebration of 250 years of circus in 2018,<sup>41</sup> which recognised the town's historical links to the circus through Philip Astley, the founder of the modern-day circus who was born in Newcastle-under-Lyme.

A strong arts and cultural offer can support efforts to maintain or enhance the attractiveness of retail centres as places to live, work and visit by offering unique experiences for visitors and/or shoppers through the animation of public spaces including art works, live performances and opportunities for local cultural identity to be explored and celebrated.

Research by Loughborough University into the customer experience of town centres found that people who shop with family and friends spend up to 50 per cent more than those who shop alone.<sup>42</sup> The report states that 'experiential' touch points of the customer journey, including social interaction, visits to cafés and restaurants, and atmosphere heighten enjoyment, prolong dwell time, increase spend and deter consumers from resorting to the online alternative. The authors suggest that smaller towns appear to be better equipped to enhance the customer experience in this way.

Of the six locations selected for this research, all but Redruth have an active Business Improvement District (BID). Birmingham in fact has a total of 11 BIDS focused on different areas of the city.<sup>43</sup> BIDs are partnerships between local councils and local businesses which are intended to provide additional services or improvements to a specified area. In the UK, BIDs are funded in whole or in part by a levy on non-domestic ratepayers.

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<sup>38</sup> <https://www.parliament.uk/business/committees/committees-a-z/commons-select/housing-communities-and-local-government-committee/inquiries/parliament-2017/high-streets-and-town-centres-in-2030-inquiry-17-19/>

<sup>39</sup> Grimsey, B. (2018) 'The Vanishing High Street'

<sup>40</sup> DCLG & ATCM (2014) 'Celebrating the Great British High Street'

<sup>41</sup> <http://circus250.com/>

<sup>42</sup> Loughborough University (2014) 'The Customer Experience of Town Centres'

<sup>43</sup> [https://www.birmingham.gov.uk/downloads/download/144/business\\_improvement\\_districts\\_bids](https://www.birmingham.gov.uk/downloads/download/144/business_improvement_districts_bids)



This is sometimes linked to, but usually collected separately from, their business rate liability, and non-payment of the levy is subject to similar remedial action by the billing body. Increasing footfall and area promotion are two of the intended benefits of BIDs, which are also vehicles for facilitating networking and strategic collaboration.<sup>44</sup> In July 2018 the active BID community totalled 305.<sup>45</sup>

The most recent survey of Business Improvement Districts, conducted by British BIDs in 2018,<sup>46</sup> acknowledges the role of culture and arts as an innovation tool.<sup>47</sup> The report cites research commissioned by Arts Council England, the Mayor of London and King's College London which highlights how BIDs and the arts and cultural sector have the potential to improve places by working together. The Improving Places report<sup>48</sup> makes a case for greater collaboration and presents examples of how BIDs are currently working with cultural organisations to drive economic growth and help communities thrive. The report in particular highlights how festivals and events can play a role in place marketing by helping to promote an area as distinctive and attractive, increasing footfall and reaching new audiences.

Many BIDs recognise the connections between culture, place branding and place making and use festivals and events as a tool to improve the image and the reality of a place. They see events as contributors to social cohesiveness and social incentives as much as major contributors to the local economy and recognise the role of festivals in influencing a sense of place.<sup>49</sup>

Most businesses consulted agreed that a rich cultural offer provides either direct or indirect benefits for business in terms of branding, identity and reputation. Regular events and high-profile arts activities were regarded as positive opportunities to promote businesses to a larger audience.

*'Positive perceptions of the area where the business is located would make the company attractive to clients, but it is still not the top of the list.'* **(Redruth)**

*'It's just going back to it being a nice place and lots to do so it's more attractive altogether and businesses can use those things as advantages when promoting or marketing.'*  
**(Stoke-on-Trent)**

*'A rich cultural offer definitely provides opportunities for businesses as high calibre arts events act as a draw for large numbers of people and offer an opportunity to get your company name out there whether it is through advertising or sponsorship.'* **(Birmingham)**

<sup>44</sup> House of Commons Library (2018) 'Business Improvement Districts'. Briefing Paper Number 04591, 7<sup>th</sup> May 2018

<sup>45</sup> Source: British BIDs <https://britishbids.info/>

<sup>46</sup> British BIDs (2018) Business Improvement Districts in the British Isles 2018'

<sup>47</sup> This survey thus covers all BIDs in the British Isles, including the Republic of Ireland, Scotland, England and Northern Ireland.

<sup>48</sup> Arts Council England, Mayor of London and King's College London (2017) 'Improving Places: Culture & Business Improvement District partnerships'

<sup>49</sup> Spencer (2018) 'Festivals and Business Improvement Districts (BIDs): Evaluating the Impacts of Town and City Centre Events on Levy Paying Businesses in the South of England. CiBM project 2018



*'Arts event performances do allow businesses a good opportunity for a business to get their name out there to a different target market. It also feeds into an idea that they are part of the community and giving something back.'* **(Birmingham)**

*'Businesses want to be associated with successful arts events as you tend to get in large crowds and the event provides a real boost to the town. By sponsoring or advertising businesses can get their brand out there and it improves their reputation as they are helping the community.'* **(Hastings)**

*'The high street needs major work at the moment, the main shopping precinct needs refurbishing, we've got a museum but if they attracted other arts and cultural organisations there it would attract more people to the area.'* **(Stoke-on-Trent)**

*'I would like Hastings to use the Pier more and put on a large open-air concert with a variety of different music styles as it would raise the profile of the town.'* **(Hastings)**

Several contributors also highlighted that aspirations to grow and strengthen their local arts and cultural offer were also linked to local plans to increase residential accommodation in towns and city centres. Recent figures from the Office for National Statistics indicates that since the start of the 21st century the population of many town and city centres has doubled in size.

Birmingham (163 per cent growth) and Southampton (94 per cent growth) are ranked in the top 10 in terms of population growth between 2002 and 2015,<sup>50</sup> whereas Stoke-on-Trent has seen a more modest growth of 14 per cent over the same period. This growth is largely fuelled by young people, in particular single professionals and a growing student population. The number of 20 to 29-year-olds in the centre of large cities<sup>51</sup> tripled in the first decade of the 21st century. More than a third had a degree, compared with 27 per cent in the suburbs and outskirts of cities. For many young people the closeness to amenities including gyms, restaurants, bars and shops outweighs downsides like smaller living spaces, noise and pollution.<sup>52</sup>

There was consensus amongst contributors that a strong arts and cultural offer was integral in attracting young people, in particular young professionals, to live in the centre of towns and cities. However, fundamentally, the availability of high-skilled and high-paying jobs remained a key driver of this population growth.

In terms of the visitor economy, evidence from the National BID Place Marketing Award, which is managed by British BIDs, demonstrates the importance of arts and culture in helping to attract visitors and increase footfall. Colmore BID, which covers the Colmore Row area of Birmingham, was recently shortlisted for the Place Marketing Award for their work on the Thresholds VR photography exhibition.<sup>53</sup>

<sup>50</sup> <https://www.bbc.co.uk/news/uk-44482291>

<sup>51</sup> Large cities are defined as those with 550,000 people or more.

<sup>52</sup> <https://www.bbc.co.uk/news/uk-44482291>

<sup>53</sup> <https://colmorebusinessdistrict.com/thresholds-vr-photography-exhibition-shortlisted-for-national-bid-award/>

Colmore BID works to promote the brand outwardly, adding to the external marketing offer of the city. They promote the brand inwardly, contributing to the vibrancy of 'Colmore Life' for those who live, work and visit the area of the city. Colmore BID has supported a range of arts and cultural events and activities including an annual food festival, which is a two day celebration of over 30 local venues that attracts over 30,000 visitors each year. Other events delivered in their second term include a cinema club, Birmingham International Dance Festival and a partnership with Moseley Arts Market. Their current business plan<sup>54</sup> outlines their intention to develop further high-quality public art and cultural installations including a new Festival of Lights and to continue to support events that celebrate Birmingham's diverse culture.

Several contributors highlighted the potential opportunities arising from the recently announced Future High Streets Fund which was launched by MHCLG in late 2018 to help local areas to respond to and adapt to changes in the high street.<sup>55</sup> The fund will serve two purposes: it will support local areas to prepare long-term strategies for their high streets and town centres; and it will also then co-fund with local area projects including investment in physical infrastructure and investment in land assembly, such as to support the densification of residential and workspace around high streets in place of under-used retail units.

Consistent with one of the themes outlined during the focus group sessions, the fund will also support the regeneration of heritage high streets by helping to restore historic high street properties through Historic England, and equipping communities with their own resources to put historic buildings back into economic use, for example as residential buildings, new work spaces or cultural venues, supported by the Architectural Heritage Fund.

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<sup>54</sup> Colmore BID (2019) 'Colmore BID Business Plan 2019/2024'

<sup>55</sup> <https://www.gov.uk/government/publications/future-high-streets-fund>

## 5.4 Business location decisions

### Headline findings

- A strong arts and cultural offer is important in attracting creative entrepreneurs and enterprises who, given their size, can be more flexible in their location decisions.
- One of the themes outlined during consultations with businesses and strategic partners was the importance of a strong arts and cultural offer in helping to grow the creative industries sector.
- A strong arts and cultural offer is a more influential factor for businesses within the retail sector, in particular given its recognised contribution to strengthening the visitor economy and generating footfall.
- Many businesses acknowledge the benefits of a strong local arts and cultural offer in supporting their workforce to achieve a good quality of life, however location decisions are more strongly influenced by infrastructure considerations such as transport connectivity, access to a skilled and qualified workforce, proximity to further and higher education institutions, premises availability and costs and competitive wage costs.

Many businesses acknowledged the benefits of a strong local arts and cultural offer in supporting their workforce to achieve a good quality of life outside of work. There was also recognition of its role in helping to retain staff by making their area a more attractive place to live.

*'I think arts and culture is pretty high up the decision-making process about locating a business in Birmingham as businesses want to see that their staff will have a good standard of leisure time and the arts and culture provision weighs heavily in this area. It is important for a business to attract good staff, so arts and culture is up there with housing, skills availability and transport links.'* **(Birmingham)**

*'I think arts and culture plays a contributing role in helping a business decide where to locate as they are looking for a location that their best workers will want to live and play in. However, compared to other factors like transport links, access to skilled staff and housing, culture and art play a less important role in the final decision.'* **(Birmingham)**

*'I think theatres are great and that side of things and live music venues, I think that's all good, but I think as a city Southampton could do a lot more in organising more events and things going on. I've got some family who live in Portsmouth and Southsea and they always seem to have a lot more events [...] I'm constantly looking for things to do at the weekend [...] but there doesn't seem to be a lot of the smaller types of events and I think that's kind of where we're missing out a bit.'* **(Southampton)**

Generally, there was a sense that arts and culture could play a larger role in determining business location decisions for smaller, independent businesses who are more affected by the environment around them and are more tied up with locality, rather than bigger businesses and corporations.

*'I think, just looking at the town, recent monies that have been put into the town centre and they are continuing to invest in libraries and new roads to get people access into the town [...] watching that process happen, I think it could influence where you base your business.'* **(Halifax)**

Businesses on the whole felt that the local arts and cultural offer did not strongly influence business locations, which are more influenced by infrastructure considerations such as transport connectivity, access to a skilled and qualified workforce, proximity to further and higher education institutions, premises availability and costs, and competitive wage costs, all of which feature regularly within the marketing materials and prospectus produced by inward investment companies.<sup>56</sup>

*'We've only been in this location for three years, it would have been low down on the priority list. We focused on parking, commuting distance and train and bus station locality. Mainly accessibility for employees, rather than the "offering of the area".'* **(Stoke-on-Trent)**

However, a number of businesses did make specific reference to the fact that a strong arts and cultural offer signified the presence of a skilled and educated population, which was a more influential factor in decisions about location.

*'I think a business looks at potential customer base, number of businesses already there and the quality of the workforce already there before considering standards of living which arts and culture is a part of. A good arts and culture offer helps, as it suggests there is an educated and skilled workforce there already, but it isn't a key factor in deciding location.'* **(Birmingham)**

*'A rich cultural offer definitely makes a city more attractive as it is usually a sign of a place which has a well-educated population and it provides the high standard of leisure time that skilled workers usually demand these days.'* **(Birmingham)**

*'Yes, I think a rich cultural offer makes a place more attractive as it suggests you have a population that is educated and skilled and has a very active community.'* **(Hastings)**

Businesses within the retail sector suggested that a strong arts and cultural offer was a more influential factor in location decisions, in particular given its recognised contribution to strengthening the visitor economy and generating footfall.

*'If you have a rich arts and cultural area attracting a large visitor pool, from a retail point of view that will have an impact on where they might want to set up a new business.'* **(Stoke-on-Trent)**

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<sup>56</sup> For example see [Make It Stoke-on-Trent and Staffordshire](#) and [West Midlands Investment Prospectus](#).

## 5.5 Business investment in the local arts and cultural offer

### Headline findings

- **The majority of the businesses consulted did not currently invest in their local arts and cultural offer. Reasons cited included a lack of awareness of the potential benefits for their business and the absence of local networking opportunities to engage with the arts and cultural sector.**
- **For some businesses the barrier to investing and/or supporting their local arts and cultural offer was due to the fact that the arts and cultural organisations that they had encountered were not ‘business minded’ enough.**
- **The research suggests there is a need to create space for dialogue between local businesses and arts and cultural organisations to discuss partnership opportunities, collaboration and sponsorship.**

The challenging funding environment facing the arts and cultural sector, as a consequence of public sector budgetary constraint, has seen growing interest across the UK in alternative sources of finance including funding and investment from the business sector. Recognising the growing importance of private philanthropy, including business investment, within the arts and culture sector, Arts Council England relaunched the private investment in culture survey in 2016.<sup>57</sup>

The most recent survey highlighted that private investment in arts and culture had grown between 2012 and 2015 with the sector appearing to be becoming less reliant on public funding. In 2014/15 business investment to support arts and cultural organisations was estimated at £96 million. Cash sponsorships were the most important form of partnership between arts and culture organisations and businesses, accounting for 54 per cent of business investment in 2014/15 followed by in-kind sponsorship (19 per cent), corporate donations (16 per cent) and corporate membership (11 per cent).

The majority (69 per cent) of the businesses consulted for this research did not currently invest in their local arts and cultural offer. The main reasons cited by businesses were due to:

- A lack of awareness of local opportunities to provide investment support and funding to strengthen their local arts and cultural offer.

*‘We would have funds to invest, I’d probably say there was a lack of knowledge of the offer.’ (Southampton)*

- A lack of available funds to invest.

<sup>57</sup> Arts Council England (2016) ‘Private Investment in Culture Survey 2012/13, 2013/14 and 2014/15’

- Prioritisation of other areas for investment, for example training or research and development.
- A lack of awareness of the potential business benefits of providing investment support and funding for their local arts and cultural offer (either in terms of return on investment or corporate social responsibility).

*'The company is highly aware of the local arts and culture offer, but we tend to not see a return on any investments we make. Previous decisions to invest in arts and culture were made on a case-by-case basis. For example, the company was one of the main sponsors for a local festival last summer but, in the end, they got nothing out of it.'* **(Hastings)**

*'It's not something that we have ever looked into in any detail because it would not impact our business.'* **(Halifax)**

- The fact that they had never been approached for sponsorship by an arts and cultural organisation.
- The absence of any local networks or opportunities to explore collaboration, sponsorship or creative partnerships with arts and cultural organisations.

*'I am not aware of any events where I can meet representatives of arts organisations.'*  
**(Birmingham)**

The focus groups highlighted a range of views regarding the ability or appropriateness of seeking investment from local businesses. These views varied, from participants that recognised the potential benefits for businesses to those that felt funding for their local arts and cultural offer was the responsibility of central and/or local government and the 'burden' of funding should not be placed on the shoulders of local businesses.

*'Going back to your original point about businesses investing, I think there has to be a payback for them to make it worth their while. There would not be many businesses here that could afford to give away even a couple of hundred quid. So it has to be a fact that the business knows that if you invest x then you will receive y. You will not receive y immediately, but you will receive it and that is a very difficult thing in Redruth. And frankly I do not believe that the businesses, especially the micro businesses, would buy into that.'*  
**(Redruth)**

For businesses that had invested in supporting their local arts and cultural offer this tended to be a one-off activity or limited to providing free advertising space to promote local opportunities. A number of businesses did recognise the benefits both in terms of brand association, corporate social responsibility objectives and marketing.

*'If businesses didn't benefit from advertising and sponsoring arts events, then they wouldn't do it. By being associated with something like arts it has a positive effect on the business in terms of being seen by a large audience plus it provides good PR for the business in terms of corporate responsibility.'* **(Birmingham)**

Whilst the majority of businesses were unaware of local networking opportunities to engage with arts and cultural sector organisations, in some areas the Chamber of Commerce had organised events to bring the business community together with arts and cultural organisations.

*'Most of the networking between arts bodies and businesses tends to be through the Chamber of Commerce who hold regular meetings and events, and one of our staff is on the Chamber of Commerce committee which helps us a great deal in terms of developing new business relationships.'* **(Birmingham)**

*'I would imagine that there are opportunities in Halifax, if we looked into them. Recently I was at a benefits function which showcased entrance passes for employees called the Art Pass.<sup>58</sup> Discussions followed as to whether this would be a potential employee benefit which we could implement in the business. Our Reward and Benefit Manager is currently undertaking research of our employees to find out what they want.'* **(Halifax)**

For some businesses, the barrier to investing and/or supporting their local arts and cultural offer was due to the fact that the arts and cultural organisations that they had encountered were not 'business minded' enough. What the research suggests is a need to create space for dialogue between local businesses and arts and cultural organisations to discuss partnership opportunities, collaboration and sponsorship. This raises a number of issues in terms of the capacity and leadership within the arts and cultural sector to coordinate such activity, in particular given the funding cuts to many local authority arts development teams,<sup>59</sup> and their ability to clearly outline the opportunities for businesses and mutual benefits that can be derived for the business sector, both for themselves and the wider business community.

*'A rich cultural offer does benefit business as it offers their staff a better work/life balance which makes them more productive, and by engaging in that cultural life through sponsorship or advertising it shows that the business isn't just about making money but that also they have a sense of responsibility for the community they are in and want to enrich the lives of the people in that community.'* **(Birmingham)**

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<sup>58</sup> <https://www.artfund.org/national-art-pass>

<sup>59</sup> <https://www.artsprofessional.co.uk/node/209066>



# Appendix 1 Research method

The research team has used a multi-method approach to generate a rich qualitative and quantitative data set from which key themes and insights have been identified. The key elements of the primary fieldwork are presented below along with an overview of the limitations and the approach.

## Nationally representative survey of adults

The national survey of the Value of Arts and Culture in Place-shaping was sent to a sample of adults in England ([Appendix 3](#)). The sample was derived from the Active Lives survey that was administered by Ipsos Mori between May 2017 and May 2018. The base sample was derived from:

- Respondents who had completed the Arts and Culture module in the Ipsos Mori survey (n=187,533)
- Those who had opted-in to follow up research
- Those who had provided a valid email address (n=7,453)

Contact details for that sample were provided by Arts Council England and email invitations were sent with unique links inviting respondents to complete the Value of Arts and Culture in Place-shaping questionnaire online. The participation rate, in terms of surveys started, was 29 per cent (2,143/7,453), and there were 1,756 completed responses, yielding a completion rate of 82 per cent (1,756/2,143). The overall response rate was 26 per cent (1,756/7,453).

Upon closure of the survey, data for respondents to the Value of Arts and Culture in Place-shaping survey were matched with demographic and socio-economic data gathered in the Ipsos Mori survey.<sup>60</sup> One respondent was not able to be matched correctly, yielding a matched sample (survey responses + demographic and socio-economic data) of 1,755.

In addition to the demographic and socio-economic data matched, additional variables that capture levels of self-efficacy, happiness, wellbeing, and life satisfaction were available from the Active Lives survey. Responses to these survey modules were randomised in Active Lives, and only 50 per cent (883/1,755) of matched respondents from the Value of Arts and Culture in Place-shaping survey were also members of Group 2 in the Ipsos Mori sample.

## Patterns of arts and culture consumption

In order to better understand the profiles of participants in terms of their interests in their local arts and culture offer, the reported attendance of respondents at arts and culture related event types in the past year was analysed. Survey respondents were presented with a list of twenty-four arts and cultural event types from which they could choose.

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<sup>60</sup> Since the survey was conducted under the re-contact authorisation for follow-up research that was given in the Ipsos Mori survey, it was not necessary to replicate this data gathering in the Value of Arts and Culture in Place-shaping survey.



The lowest number of event types attended in the past twelve months was zero, and the highest number reported was twenty, with the average across the whole sample being 5.59. In order to investigate whether there is any set of factors that may systematically explain the number of different event types attended, respondents were classified as attending a low number of event types (0 to 4), a medium number of event types (5 to 9), or a high number of event types (10 or more). The frequency of those groups generated is shown below.

#### Number of event types attended in past twelve months, grouped

Group	Freq.	Per cent	Cum.
Low	726	40.63	40.63
Medium	801	44.82	85.45
High	260	14.55	100.00
Total	1,787	100.00	

These groups were then analysed to see if there are any relationships between the diversity of event types attended and the number of arts and cultural assets within a 15-20 minute walk of the respondent's household,<sup>61</sup> while controlling for possible socio-demographic and regional/place-based variables.<sup>62</sup> The results of this analysis<sup>63</sup> are shown below.

#### Socio-demographic and place-based factors associated with number of event types attended

Group	Factors explaining level of event types attended
Low (compared to medium)	Lower number of community assets, lower number of cultural assets, younger, male, with Level 2 or 3 qualifications or no qualifications, NS-SEC5 or below, fewer children, not living as a couple, not living in London, living in less affluent areas
Medium	(reference group)
High (compared to medium)	Higher number of cultural assets, female, not with Level 2 or 3 qualifications

The preceding analysis gives an insight into the correlation of the **overall number** of event types attended. The responses to the question about event types attended were then analysed to see whether particular **patterns** of participation could be detected in the data. Using a principal-components factor analysis with varimax rotation, seven 'factors' were retained for examination. Close inspection of these factors reveals that each corresponds broadly to a type of arts and culture 'consumer,' and that meaningful labels can be applied to them. The predominant patterns of arts and culture consumption revealed by this analysis are shown over page.

<sup>61</sup> The questionnaire asked, "Which of these are located within a 15-20 minute walk from your home?" See Appendix 2 for full response list.

<sup>62</sup> Socio-demographic and regional characteristics looked at included: age, gender, education, number of children, household status, region, urban/rural setting, and deprivation of area.

<sup>63</sup> The analysis was performed using a multinomial probit model. Multinomial probit was preferred over multinomial logistic regression based on the negative skew observed in the dependent variable (both grouped and ungrouped).

Types of arts and culture consumer

Factor	Arts and cultural consumption	Type
1	Art or photography exhibition, museum, craft exhibition, street arts, public art display	Visual arts
2	Opera, classical music	Classical music
3	Film, library	Film
4	Musical, other live music event	Contemporary music
5	Contemporary dance, other dance event	Dance
6	Culturally specific festival, African/Asian/Chinese dance	Culturally diverse
7	Circus, pantomime	Comedy

Each of these arts and culture consumption types were then examined to see if they are correlated with any particular socio-demographic group or region of the country. The significant correlations are shown below.

Socio-demographic and place-based factors associated with patterns of arts and culture consumption

Type	Significant socio-demographic characteristics
Visual arts	More educated, higher occupational status, less likely to be in Midlands or south-east
Classical music	Older, female, higher occupational status, more educated, living in more affluent areas, more likely to be in London or the south-east
Film	Female, employed, more educated, more likely to be living in a house share, more likely to be in the south-east or south-west
Contemporary music	Younger, female, employed, more likely to live with either no children or adult children, living in more affluent areas
Contemporary dance	Female, more likely to be living with parents or in a multi-generational household
Culturally diverse	Younger, male, living in less affluent areas
Comedy	Students, couples with children

This question was explored in more detail to see if there are any particular socio-demographic or regional groups, or types of arts and cultural consumers, who feel that they would like to see more opportunities. An analysis was performed<sup>64</sup> including the types of arts and cultural consumer types distinguished above. The results of this analysis reveal that those levels of agreement with the statement, “I would like to see more arts and culture opportunities in the area that I live” are likely to be influenced by:

- Age (younger)
- Not being in a couple with no children
- Not being in a couple with adult children
- Not living with parents
- Living in the Midlands or the south-west
- Being a consumer of visual arts, classical music, film, or culturally diverse events; and
- Not being a consumer of Dance.

<sup>64</sup> Using an Ordinary Least Squares linear regression model.

### Interest in increased arts and cultural event attendance

In the survey, respondents were asked whether they had wanted to go to any arts or cultural events in the past twelve months but were unable to do so. The lowest number of event types not attended, but which the respondent was interested in going to, in the past twelve months was zero, and the highest number reported was twenty-two, with the average across the whole sample being 2.49. In order to investigate whether there is any set of factors that may systematically explain the number of different event types not attended, respondents were classified as not attending, but being interested in, a low number of event types (0 or 1), a medium number of event types (2 to 4), or a high number of event types (5 or more). The frequency of those groups generated is shown below.

#### Number of event types not attended (but interested in) in past twelve months, grouped

Group	Freq.	Percent	Cum.
Low	849	47.51	47.51
Medium	651	36.43	83.94
High	287	16.06	100.00

Again, these groups were then analysed to see if there are any relationships between the diversity of event types not attended, but interested in, and the number of arts and cultural assets within a 15-20 minute walk of the respondent's household, while controlling for possible socio-demographic and regional/place-based variables. The results of this analysis, are shown below.

#### Socio-demographic and place-based factors associated with number of event types attended

Group	Factors explaining level of event types not attended
Low (compared to medium)	Female, not in intermediate occupations (NS-SEC3), level 3 qualification
Medium	(reference group)
High (compared to medium)	Female, long-term unemployed, children, level 3 qualification, not living in a couple, living in less affluent areas

Using the same factor analytical approach employed above to distinguish types of arts and cultural consumption, the data was examined to see if there are systematic patterns or types of things that people would be interested in. The predominant patterns of interest revealed by this analysis are shown over page.

Types of arts and culture potential consumer

Factor	Arts and cultural non-consumption	Type
1	Film, art or photography exhibition, museum, video or electronic arts event, book event, street arts	1
2	Carnival, ballet, contemporary dance, African/Asian/Chinese dance	2
3	Musical, other live music event	3
4	Library, culturally specific festival	4
5	Public arts display, circus, play	5

Each of these patterns of interest types were then examined, as above, to see if they are correlated with any particular socio-demographic group or region of the country. The significant correlations are shown below.

Socio-demographic and place-based factors associated with patterns of arts and culture non-consumption

Type	Significant socio-demographic characteristics
1	Female, children, not living in a couple, more likely to be in the Midlands
2	Female, more likely to be living in a complex household situation
3	Older, female
4	Moderately educated, more likely to be living in the Midlands
5	Younger, female, student or lower supervisory occupations, children, moderately educated, urban city/town, less affluent areas

The responses were examined to see why people reported being unable to go to an event in which they were interested in the last twelve months. Presented with a menu of options, respondents who had indicated that they would like to have gone to an arts and cultural event, but were unable to, gave the following reasons:

- No event of the type interested in (45 per cent)
- Not enough time (36 per cent)
- Too expensive (26 per cent)
- Too difficult (24 per cent)
- No-one to go with (14 per cent); and
- Other reason (28 per cent).

These results were then examined to see whether there are any systematic factors that might explain why respondents have identified particular barriers to their own arts and cultural consumption. The results of this analysis are displayed over page.

Socio-demographic and place-based factors associated with reasons for non-consumption

Reason for non-consumption	Factors associated with reasons for non-consumption
No event of the type interested in	Older, students, children, not in a major city
Not enough time	Younger, not in intermediate occupations (NSSEC3), not with level 2 qualification,
Too expensive	Younger, female, fewer cultural assets, long-term unemployed, level 3 qualification, living in London, not living in a rural village, less affluent areas
Too difficult	Female, fewer cultural assets, children, major city, less affluent areas
No-one to go with	Younger, not living in a couple or as a lone parent, not living in a rural hamlet

## Multivariate analyses on push and pull-factors

Variables of interest	Job	Schools	Arts and culture offer
Relationship to place	Adult movers, lived one or many other places	Adult movers, lived one or many other places	
How long have you lived here?	Longer	Longer	
Arts and cultural assets			More cultural assets
Community assets		More community assets	
Frequency of going to Arts and cultural events			More frequently
Would like to go to events but didn't			Would like to more
Gender			Female
Age	Younger	Younger	
Urban/rural			
NSSEC8	Self-employed/small employers		
Children		Children	Not with one child
Employment status	Not retired, looking after the house/children, or long term sick/disabled		
IMD		Live in less deprived areas	
ACE region		Do not live in the South-west	
Model performance	19 per cent	27 per cent	23 per cent

## Deliberative focus groups

The research team scheduled a series of focus groups in six locations across England to test in more depth the findings from the nationally representative survey. The six locations included a mix of cities and towns and covered all of Arts Council England's areas outside of London, namely:

- Birmingham
- Halifax
- Hastings
- Redruth
- Southampton
- Stoke-on-Trent

The focus group sessions were promoted by a network of local community organisations who also assisted with the recruitment of participants. The focus group sessions were open to people who had lived or worked in the area for any period of time, and community organisations helped to bring together a range of people including different age groups.

A total of 75 participants took part in the focus group sessions and included a range of age groups. Participants were provided with information regarding the context for the research and a series of discussion points a minimum of one-week in advance of the session. All focus group sessions were audio-recorded, and the recordings were transcribed to facilitate subsequent thematic analysis of the data. A copy of the information sheet provided to focus group participants is provided in [Appendix 3](#).

## Business and strategic consultations

The research team also conducted telephone interviews with a sample of 96 businesses and business leaders across the six locations. The purpose of the interviews was to gather their views on the importance of the arts and cultural offer within a place in: attracting and retaining employees; enhancing their reputation; inviting inward-investment; and more generally, influencing their ability to undertake more business. The profile of the businesses consulted by sector is presented in [Appendix 4](#).

For the business consultations, two methods were employed to construct a contact sample:

- Commercial sample acquired through Experian (Birmingham, Halifax, Southampton, and Stoke-on-Trent)
- Targeted sample acquired from stakeholders and supplemented with web scraping (Hastings, Redruth).

### *Commercial sample*

The commercial sample was acquired from Experian, and stratified by businesses with 25 to 49 employees, those with 50 to 99, and those with 100 or more. Valid contacts were defined

as those for whom a named senior decision maker and viable contact information were provided. The sample totals for each location are:

- Birmingham: 830 valid contacts
- Halifax: 78 valid contacts
- Southampton: 280 valid contacts
- Stoke-on-Trent: 210 valid contacts

#### *Targeted sample*

The targeted sample was constructed from business contact information that was provided by relevant stakeholders, such as Locate East Sussex and the Redruth and Cornwall Chambers of Commerce. Where contact information for a senior decision maker could not be provided, in accordance with GDPR regulations, web scraping was used to gather publicly-available contact information.

#### *Mode*

Businesses were contacted by the Wavehill Research Team by telephone and asked to participate in a 15-20 minute telephone interview. Where businesses requested a call back at a pre-arranged time, the Discussion Guide used for the interview was distributed in advance of that call back, if businesses provided an email address to which it should be sent. All interviews were conducted using Computer Assisted Telephone Interviewing (CATI).

Additional interviews were completed with a number of strategic partners including representatives from local council inward investment teams, Chambers of Commerce, Business Improvement Districts and regional growth companies. A list of contributors to the research is provided in [Appendix 5](#).



# Appendix 2 National survey tool

## Value of Arts and Culture in Place-shaping

### Introduction

Wavehill, a social and economic research company, have been commissioned by Arts Council England to do a consultation with residents and businesses across the country. We are gathering views and getting feedback on the role that arts and culture play in making local communities vibrant and desirable places to live. Even if you do not attend many arts or cultural events yourself, we would really love to hear your thoughts about the community that you live in and get feedback from you as to the sort of place you live in. Your answers to our short survey will help shape the way in which the Arts Council is able to raise funding and help to support all forms of arts and culture in England.

**Any comments that you make will be confidential and the information you provide will only be used for the purposes of this research. Comments that you make will not be attributed to you unless we have your explicit permission to do that. It is also important to note that the team undertaking the research do not work for Arts Council England or any of the organisations that are involved in the delivery or funding of this project. This is independent research. The data collected from this survey will be securely stored by Wavehill and deleted six months after the evaluation comes to an end (expected to be May 2019).**

**If you have any questions regarding the survey or the evaluation more generally, please contact Andrew Engeli at Wavehill ([surveys@wavehill.com](mailto:surveys@wavehill.com) | 01545 571711).**

**Please note: if you would like further information regarding this project, how your data will be used and your rights under data protection laws please see the following webpage: [www.wavehill.com/ace-pn](http://www.wavehill.com/ace-pn)**

Which statement best captures your relationship to the community you live in?

- I was born here and have never moved away from the area
  - I grew up here as a child, moved away but returned as an adult
  - I moved here and have never lived anywhere else as an adult
  - I have lived in several places as an adult and this is one of them
  - I am only here on a temporary basis and consider somewhere else my real home
- 

Roughly how many years have you lived in your current neighbourhood?

---

**Firstly, we'd like to ask you about what is available in your local area...**

---

Which of these are located within a 15-20 minute walk from your home?

- General/grocery shop
  - Pub
  - Park
  - Community centre/hall
  - Sports centre/club
  - Youth centre/club
  - Health centre/GP
  - Chemist
  - Post office
  - Primary school
  - Secondary school
  - Church/place of worship
  - Public transport links
  - None of these
-

Which of these are located within a 15-20 minute walk from your home?

- Art gallery
- Cinema
- Theatre
- Library
- Historical landmark
- Sports venue
- Music venue
- Symphony hall
- Dance studios
- Festival site
- Botanical gardens
- Museum
- Other cultural/social/leisure venue etc
- None of these

Other venue, please specify

---

Overall, how satisfied or dissatisfied are you with:

	Very satisfied	Fairly satisfied	Neither satisfied nor dissatisfied	Fairly dissatisfied	Very dissatisfied
The local services and amenities in your local area?	•	•	•	•	•
The arts and cultural offerings in your local area?	•	•	•	•	•
Your local area as a place to live?	•	•	•	•	•

**Next, we'd like to ask you about your engagement with the arts and culture...**

In the last 12 months, have you been to any of the following events (*this could be anywhere, not just locally*)?

- Library
- Film at a cinema or other venue
- Exhibition or collection of art, photography or sculpture
- Exhibition or event at a museum
- Craft exhibition (not crafts market)
- Event which included video or electronic art
- Event connected with books or writing
- Street arts (art in everyday surroundings like parks, streets or shopping centres)
- A public art display or installation (an artwork such as sculpture that is outdoors or in a public place)
- Circus (not animals)
- Carnival
- Culturally specific festival (for example, Mela, Baisakhi, Navrati)
- Play/drama
- Pantomime
- Musical
- Opera/opera
- Classical music performance
- Jazz performance
- Other live music event
- Ballet
- Contemporary dance
- African people's dance or South Asian and Chinese dance
- Other live dance event
- None of these

---

What sort of music you have been to see?

- Rock music
- Soul, R&B or hip-hop music
- Folk or country and western music
- Reggae/Calypto/Caribbean music
- African music
- South Asian music
- Spanish or Latin American music
- Other
- Don't know

If other, please specify

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And in what kinds of venue have you watched this music?

- Pub/bar
- Hotel
- Restaurant/café
- Small club
- Medium to large live music venue
- Clubs and associations (private)
- Student union
- Church halls/community centres
- Park/field
- Other
- Don't know

If other, please specify

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How easy was it to get to the [venue]

	Very easy	Quite easy	Not very easy	Not at all easy	Don't know/can't remember
Library	•	•	•	•	•
Film at a cinema or other venue	•	•	•	•	•
Exhibition or collection of art, photography or sculpture	•	•	•	•	•
Exhibition or event at a museum	•	•	•	•	•
Craft exhibition (not crafts market)	•	•	•	•	•
Event which included video or electronic art	•	•	•	•	•
Event connected with books or writing	•	•	•	•	•
Street arts (art in everyday surroundings like parks, streets or shopping centres)	•	•	•	•	•
A public art display or installation (an artwork such as sculpture that is outdoors or in a public place)	•	•	•	•	•
Circus (not animals)	•	•	•	•	•
Carnival	•	•	•	•	•
Culturally specific festival (for example, Mela, Baisakhi, Navrati)	•	•	•	•	•
Play/drama	•	•	•	•	•
Pantomime	•	•	•	•	•
Musical	•	•	•	•	•
Opera/opera	•	•	•	•	•
Classical music performance	•	•	•	•	•
Jazz performance	•	•	•	•	•
Other live music event	•	•	•	•	•
Ballet	•	•	•	•	•
Contemporary dance	•	•	•	•	•
African people's dance or South Asian and Chinese dance	•	•	•	•	•
Other live dance event	•	•	•	•	•
None of these	•	•	•	•	•

In the last 12 months, would you have liked to go to any of these events but did not?

- Library
- Film at a cinema or other venue
- Exhibition or collection of art, photography or sculpture
- Exhibition or event at a museum
- Craft exhibition (not crafts market)
- Event which included video or electronic art
- Event connected with books or writing
- Street arts (art in everyday surroundings like parks, streets or shopping centres)
- A public art display or installation (an artwork such as sculpture that is outdoors or in a public place)
- Circus (not animals)
- Carnival
- Culturally specific festival (for example, Mela, Baisakhi, Navrati)
- Play/drama
- Pantomime
- Musical
- Opera/operetta
- Classical music performance
- Jazz performance
- Other live music event
- Ballet
- Contemporary dance
- African people's dance or South Asian and Chinese dance
- Other live dance event
- None of these

Can you tell us why you did not go to these events?

- Too expensive
- Too difficult to get to
- Not enough time
- Not an event in my area or region
- No-one to go with
- Other

Can you tell us how important each of the following is in your decision to move to this area?




	Very important	Somewhat important	Neither important nor unimportant	Somewhat unimportant	Very unimportant	Don't know
A good job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Schools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to amenities (shops, services, health care)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Arts and cultural offer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outdoor activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A sense of community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Can you tell us how important each of the following is in your decision to remain in this area?





	Very important	Somewhat important	Neither important nor unimportant	Somewhat unimportant	Very unimportant	Don't know
A good job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Schools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to amenities (shops, services, health care)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Arts and cultural offer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outdoor activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A sense of community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>







Please tell us how much you agree or disagree with each statement on a scale of 1 to 5 (where 1 means strongly agree and 5 means strongly disagree).

	Strongly agree		Strongly disagree	Don't know	
	1	2	3	4	5
I don't really pay much attention to the arts and cultural activities in my area					
Arts and culture help make communities desirable places to live					
The arts and cultural offer in my community has helped enhance its reputation as a good place to live					




Please tell us how much you agree or disagree with each statement on a scale of 1 to 5 (where 1 means strongly agree and 5 means strongly disagree).

	Strongly agree		Strongly disagree	Don't know	
	1	2	3	4	5
The arts make a difference to the area where I live					
Arts and culture are not really for people like me					
There are lots of opportunities to get involved in the arts if I want					
The arts and culture are essential to my life					

Please tell us how much you agree or disagree with each statement on a scale of 1 to 5 (where 1 means strongly agree and 5 means strongly disagree).

	Strongly agree		Strongly disagree	Don't know	
	1	2	3	4	5
I feel that I have enough information about what is going on in the arts and culture in my community					
I feel that I have enough information about what is going on in the arts and culture outside my community					
I generally find out too late about arts and cultural events that I would liked to have attended in my area					
There is rarely difficulty getting tickets and places for events that I want to attend					

Please tell us how much you agree or disagree with each statement on a scale of 1 to 5 (where 1 means strongly agree and 5 means strongly disagree).

	Strongly agree		Strongly disagree	Don't know	
	1	2	3	4	5
I would like to see more arts and cultural opportunities where I live					
The arts and culture are good for my wellbeing					
Going to arts and culture events help me feel part of my community					

**Your community**

The final questions are about your immediate neighbourhood and the wider local area. *Please think of the immediate neighbourhood as a few minutes walking distance from your home and the wider area being within a 15-20 minute walking distance from your home.*

First, how strongly do you feel you belong to your immediate neighbourhood?

- Very strongly
  - Fairly strongly
  - Not very strongly
  - Not at all strongly
- 

Generally speaking, would you say that most people can be trusted, or that you can't be too careful in dealing with people?

- Most people can be trusted
  - Can't be too careful in dealing with people
  - It depends
- 

Do you think that over the past two years your local area has ...?

- Got better to live in
  - Got worse to live in
  - Not changed much (hasn't got better or worse)
  - Have not lived here long enough to say
- 

Why do you say this?

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To what extent do you agree or disagree that you personally can influence decisions affecting your local area?

- Definitely agree
- Tend to agree
- Tend to disagree
- Definitely disagree

**Thank you for taking part in this survey**

# Appendix 3 Focus group guide

## Research into the Value of Arts and Culture in Place-shaping

### Focus group guide

#### **This document**

First of all, thank you for agreeing to take part in a focus group exploring the contribution of arts and culture in promoting and driving positive economic and social outcomes at a local level. This is a guide for the discussion that we would like to have with participants at the session. We would be grateful if you could find a few minutes to read it in advance of attending the focus group, details of which are provided below:

**Venue:** xxx

**Date:** xxx

**Time:** xxx

This guide includes some background information about the research and a list of questions that we would like to discuss. The focus group should last no longer than one hour. Refreshments will be provided on arrival.

#### **Some background**

Wavehill were commissioned by Arts Council England to generate evidence to support the notion that arts and culture has the ability to promote and drive positive economic and social outcomes at a local level and thereby play a key role in place-shaping. The research seeks to understand *if* and *how* a strong arts and cultural offer within a place can impact on its ability to attract more people to live and work, and encourage people to remain, in an area.

If you have any questions about this research please contact Project Lead Andy Parkinson on 0191 359 2190 | [andy.parkinson@wavehill.com](mailto:andy.parkinson@wavehill.com) or Joe Shaw, Senior Officer, Policy and Research at Arts Council England, on 0161 934 4364 | [joe.shaw@artscouncil.org.uk](mailto:joe.shaw@artscouncil.org.uk)

#### **Ground rules for the focus group**

The focus group will be facilitated by two members of the research team, xx and xx. During the session we are keen to listen to a range of views on the discussion points we have outlined. As such we would encourage you to be honest in your responses and also to respect the opinions of others.

#### **Audio recording**

Our team will be audio-recording the focus group session, which is solely for the purpose of the subsequent analysis of the discussion and use of verbatim quotations to illustrate specific points made. This recording will be anonymous and no names will be attributed to individual contributors in the final research report. The audio file will be deleted at the completion of the research in March 2019.

## **Privacy notice**

A privacy notice explaining how we will treat the information gathered from this focus group, how it will be stored, and what your rights are, will be available at the focus group session.

## **Your local arts and cultural offer**

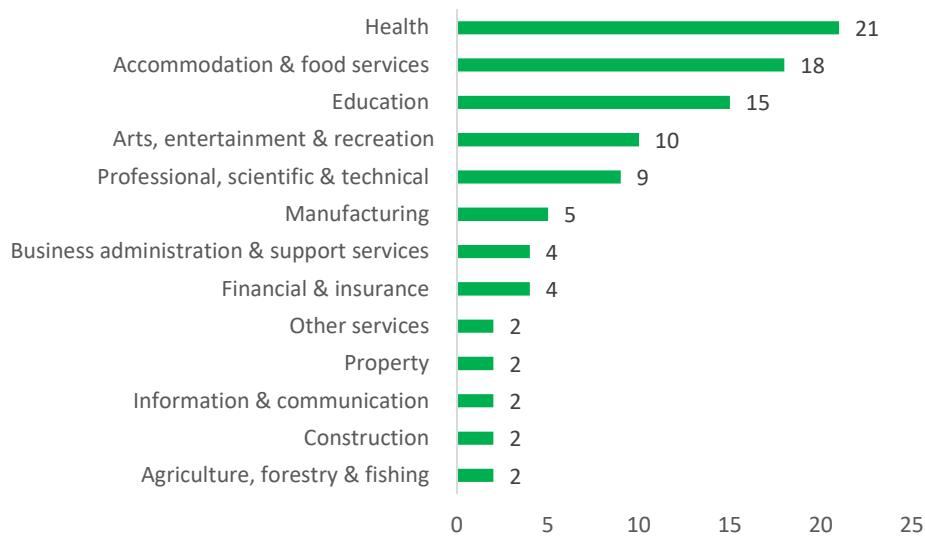
- How satisfied are you with the local arts and cultural offer in xx?
- To what extent does a rich arts and cultural offer help make communities, in general, more desirable places to live?
- To what extent do you think your local arts and cultural offer influences people's decisions to move to xx?
- Do you think your local arts and cultural offer has helped enhance xx's reputation as a good place to live?
- How easy is it for local people to access information about what is going on in the arts and culture in xx?
- What, if any, additional arts and cultural opportunities would you like to see in xx? Are there any amenities *outside of arts and cultural ones* that you would like to see in xx?
- To what extent do you agree that going to arts and cultural events makes you feel part of your community?
- How much is your local arts and cultural offer a consideration or factor in you deciding to live in xx?

## **Arts and the business community**

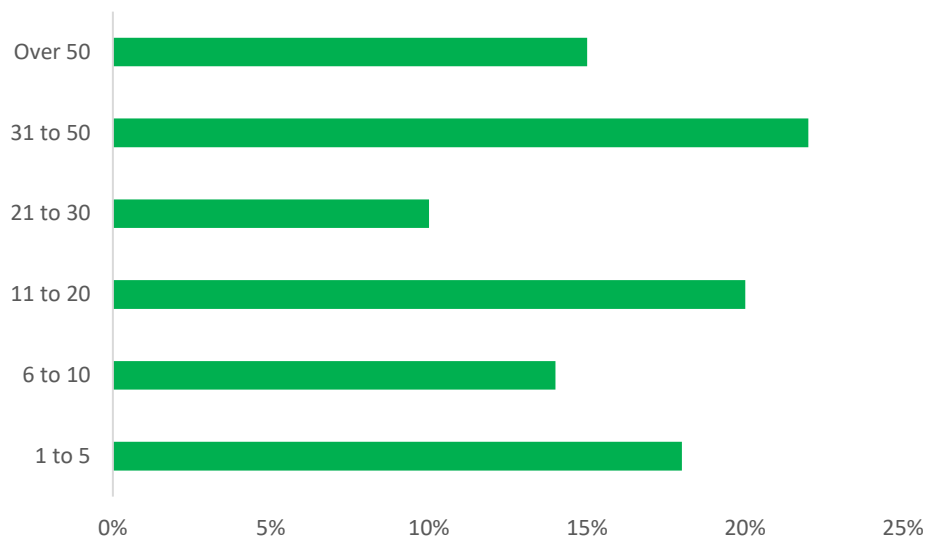
- To what extent do you think that a strong arts and cultural offer makes an area a more attractive place for businesses to locate?
- How important do you think it is for local businesses to invest in and/or support the arts and cultural offer?
- To what extent do you think supporting the local arts and cultural offer reflects well on businesses?
- What role do you think a strong arts and cultural offer can or does play in making high streets more attractive places to visit and spend time?

# Appendix 4 Business consultations

**Figure A1: Profile of businesses consulted by sector**



**Figure A2: Length of time located in the area (years)**



## Appendix 5 List of contributors

- Beth King, Marketing Communications Manager, Locate East Sussex
- Francis Runacres, Executive Director, Enterprise and Innovation, Arts Council England
- Jeff Walters, Economic Development Manager, Invest Southampton
- Lara MacShee, Community Development Manager, Redruth Town Council
- Kim Conchie, CEO of Cornwall Chamber of Commerce
- Mike Mountfield, Projects Manager: Colmore Business Improvement District, Birmingham City Council
- Nicola Lloyd, Head of Inward Investment, Invest in Cornwall
- Paul Bristow, Director, Strategic Partnerships, Arts Council England
- Roger Mendonça, Chief Operating Officer, West Midlands Growth Company
- Sara Williams, Chief Executive, Staffordshire Chambers of Commerce
- Steve Lovatt, Business Growth Manager, City of Stoke-on-Trent
- Symon Easton, Head of Cultural Development, Birmingham City Council
- Wayne Pell, Business Improvement District Manager, Birmingham City Council

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