

West Midlands Cultural Sector Research Project: What have we have learnt and what should our future be?

**– Culture
Central –**

**Culture Central is the
collective voice of the cultural
sector in the West Midlands.**

It convenes, challenges and
connects to create opportunities
through culture for places and
people across the region.

– Culture Central –



West Midlands
Combined Authority



Birmingham
City Council



West Midlands
Growth Company



Supported using public funding by
**ARTS COUNCIL
ENGLAND**



Department for
Digital, Culture,
Media & Sport

West Midlands Cultural Sector Research Outputs:

- Audience Research report
- Audience Tool (via Culture Central website)

- Economic & Social Value report
- Cluster Report
- Cultural Infrastructure Map (via WMCA website)



Erica Love

Director, Culture Central

Culture Central: The past 18 months

- West Midlands Culture Response Unit
- More Than a Moment
- West Midlands Music Board
- Mayoral Hustings

“It was useful to hear about the challenges everyone was going through, their ideas and connections... paradoxically this wouldn't have happened before the pandemic, **we wouldn't have had lots of people together in a room talking about their work, projects and practice**”

WMCRU Evaluation

“**Anyone can join in, and (for the first time) the size of the organisation does not matter so much**”

WMCRU Evaluation

“The West Midlands has always had a great music scene, **but the sector has never before had a unified voice**. I'm delighted to see the formation of this new board, which will ensure that the region's musicians, fans, venues, labels, managers and freelancers are represented in every conversation about strategy and investment. Music gives the region its soul and identity, and it needs to have this voice.”

Joan Armatrading

Tim Fanning
Director, Urban Solutions



West Midlands Cultural Study



Summary of Key Findings – Oct 2021

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XXXXXXXXXXXXXXXXXXXX
WE MADE THAT
XXXXXXXXXXXXXXXXXXXX

tom fleming / creative consultancy

Presentation **Outline**

Overview of our **Scope & Methodology**

Key Findings from the **Research**

Cultural Infrastructure Mapping



Scope & Methodology

Objective of the Research

“Provide both **quantitative and qualitative analysis of the cultural sector** in the West Midlands to provide an evidence base for future development of the sector in the region, as well as maximise opportunities.”

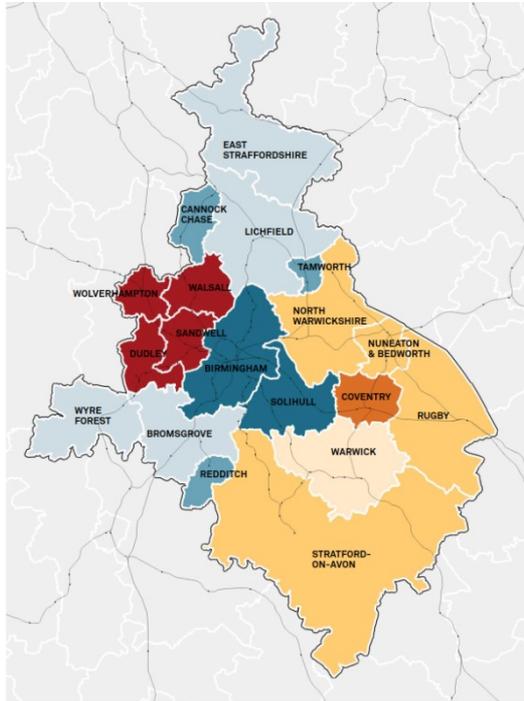
Scope of Our Work

1. Analysis of:
 - cultural sector **employment** in the West Midlands
 - FE/HE **education** data relating to cultural sector
 - public & private sector **investment** to the cultural sector
2. Wider **economic impact** assessment:
 - Supply chain and induced effects
 - Cultural tourism
3. **Social value**
4. Mapping of **cultural sector infrastructure** and assets

Plus:

Additional cluster analysis for North Birmingham, Digbeth, Leamington Spa and Dudley.

Study Area



KEY

WMCA CORE GEOGRAPHY

Black Country LEP

■ Constituent members

Greater Birmingham & Solihull

■ Constituent members

■ Non-constituent members

■ Part of the LEP but not the WMCA

Coventry & Warwickshire LEP

■ Constituent members

■ Non-constituent members

■ Part of the LEP but not the WMCA

3 LEPs

19 Local Authorities

3 LEPs	19 Local Authorities
Black Country LEP	Dudley
	Sandwell
	Walsall
Coventry & Warwickshire LEP	Wolverhampton
	Coventry
	North Warwickshire
	Nuneaton & Bedworth
	Rugby
	Stratford-on-Avon
	Warwick
Greater Birmingham & Solihull LEP	Birmingham
	Bromsgrove
	Cannock Chase
	East Staffordshire
	Lichfield
	Redditch
	Solihull
	Tamworth
	Wyre Forest

Defining the Cultural Sector

DCMS Cultural Sector Sub-Sectors
Arts (Performing Arts, Artistic Creation)
Film, TV and Music
Radio
Photography
Crafts
Museums and Galleries
Library and Archives
Cultural Education
Heritage



1. Publishing, computer games, software publishing, computer programming, computer consultancy activities
2. Film, TV, music, radio
3. Heritage, retail of music / video recordings, manufacture of musical instruments, reproduction of recorded media
4. Heritage
5. Arts, museum activities
6. Renting sports goods, operation of sports facilities, other sport

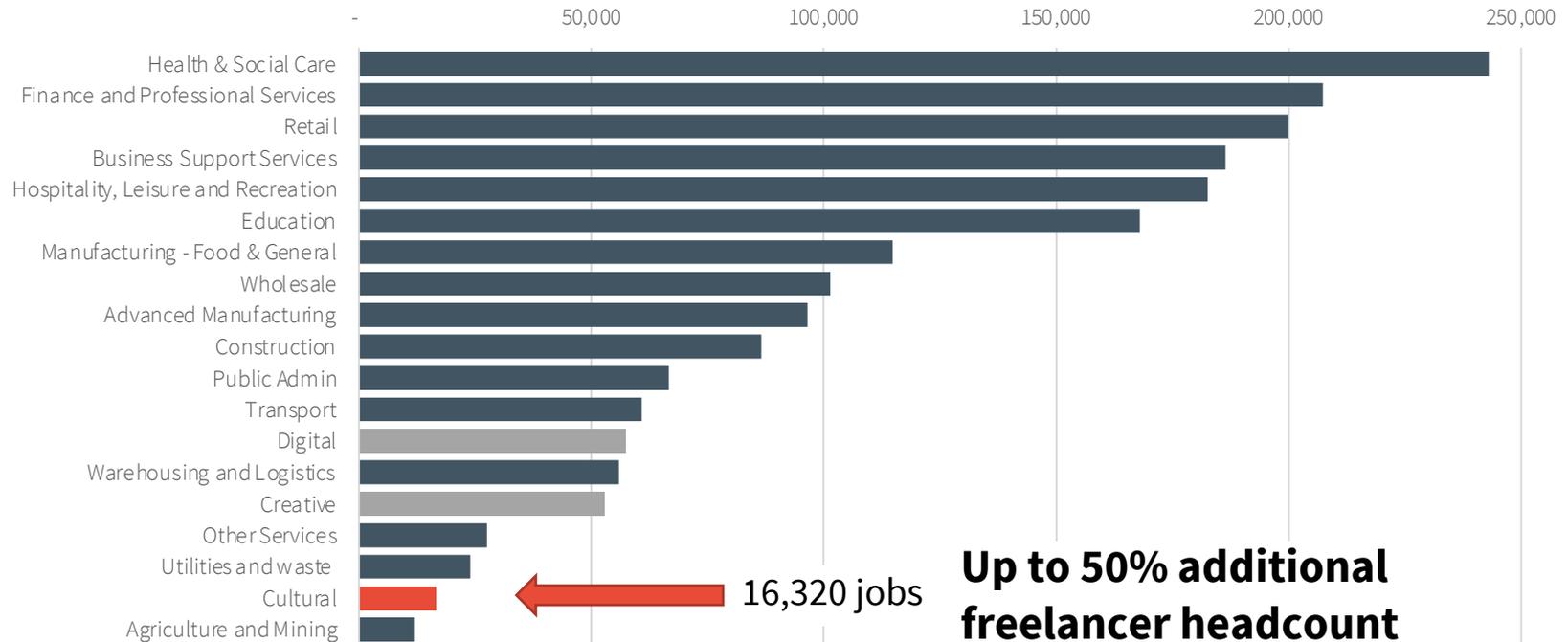


Key Findings



Employment Analysis

Culture a relatively small sector in employment terms, but note **very high incidence of freelancers**



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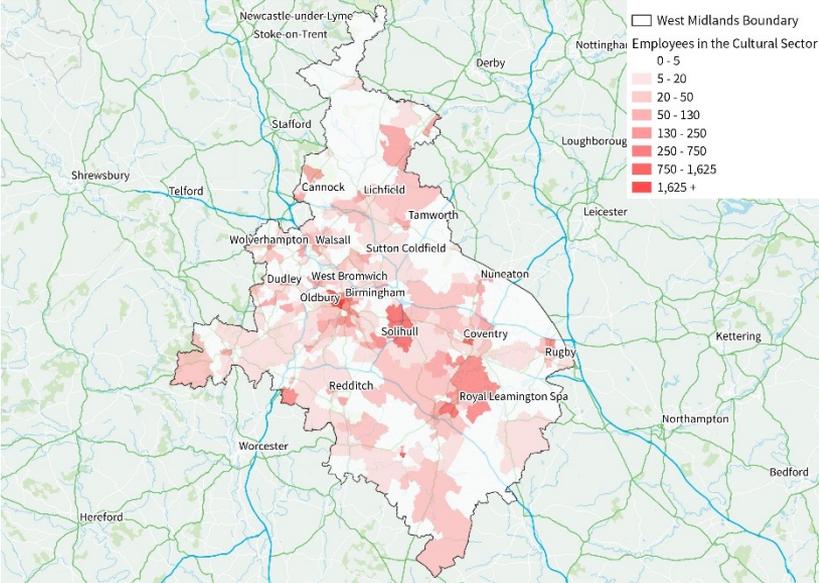
Note: data does not include freelancers

Benchmarking: Other Geographies

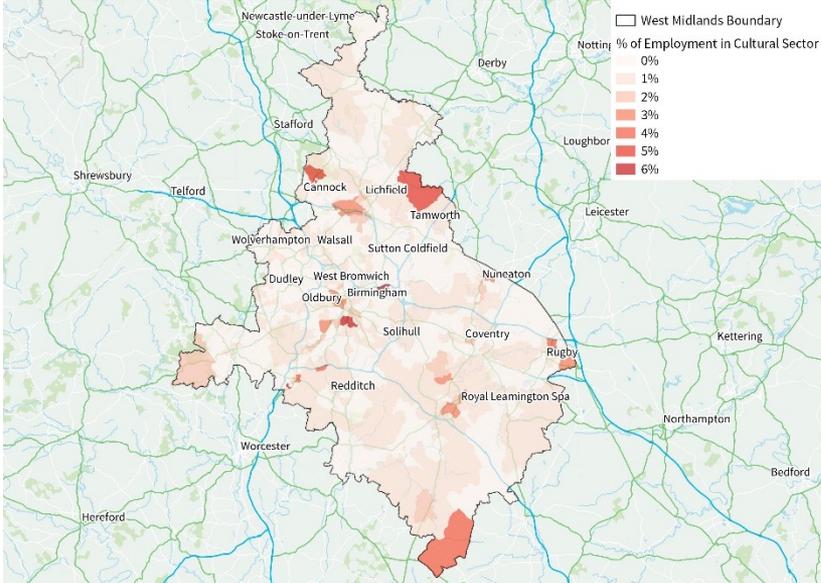
	Cultural sector employment	All employment (millions)	% of the total
Greater Manchester	21,000	1.4	1.5%
West of England	7,000	0.5	1.3%
North of Tyne	5,000	0.4	1.3%
Liverpool City Region	7,000	0.7	1.0%
West Yorkshire	11,000	1.1	1.0%
West Midlands	16,320	1.8	0.9%
Cambridgeshire and Peterborough	4,000	0.5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

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

Location of Cultural Employment

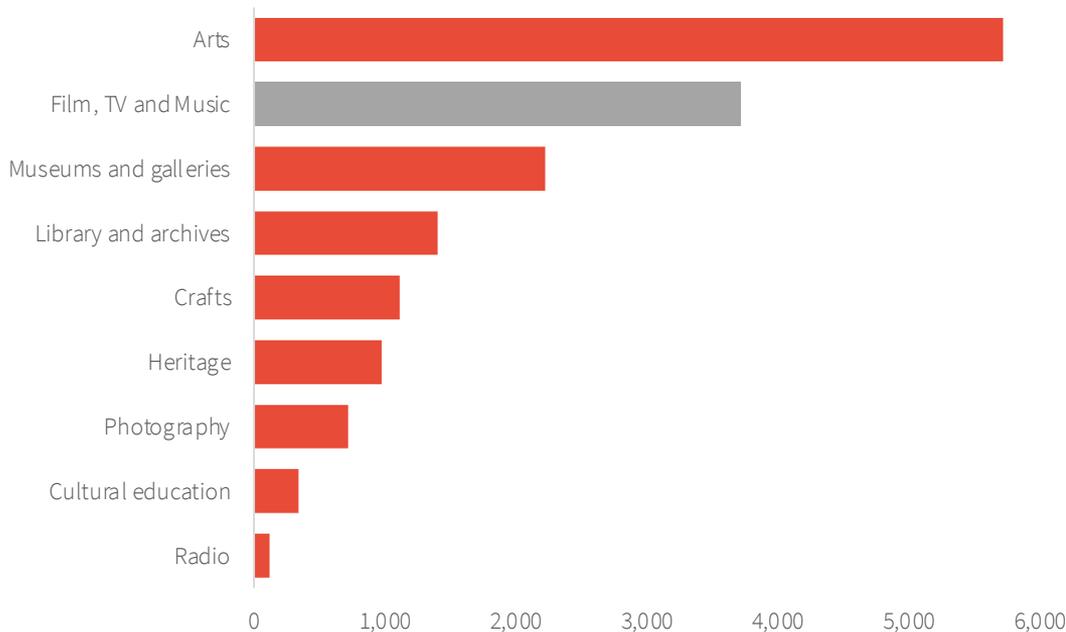


% of Employment in Cultural Sector



Strengths in Arts, but spread across sub-sectors...

Cultural Employment by Sub-Sector, 2019



Employment in wider cultural sector c. 4 X greater than film, TV and music

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Note: data does not include freelancers

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Benchmarking: Location Quotients (> 1 = more concentrated than national average)

5.7 Museums and Galleries in Dudley

33.3 Heritage in Warwick

2.3 Crafts in Walsall

11.4 Crafts in Birmingham

2.2 Heritage in Nuneaton and Bedworth

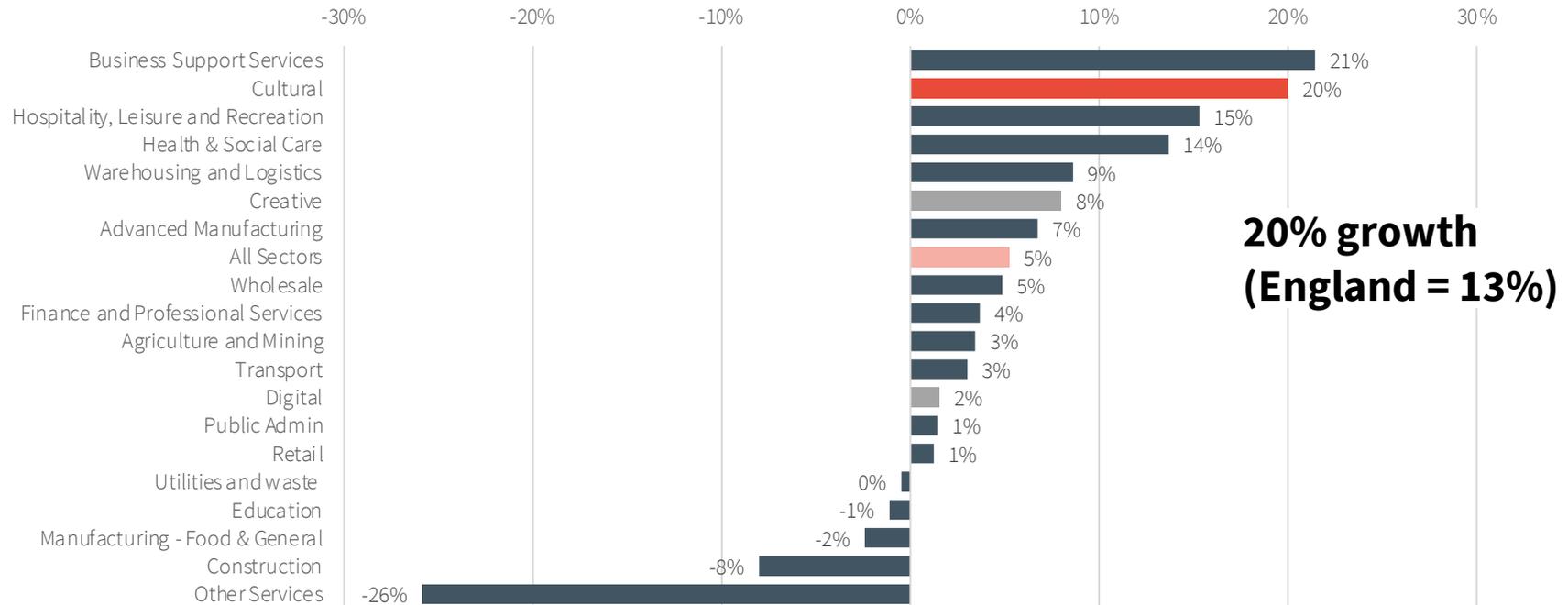
8.9 Heritage in Solihull

4.5 Museums and Galleries in Coventry

3.0 Museums and Galleries in Lichfield

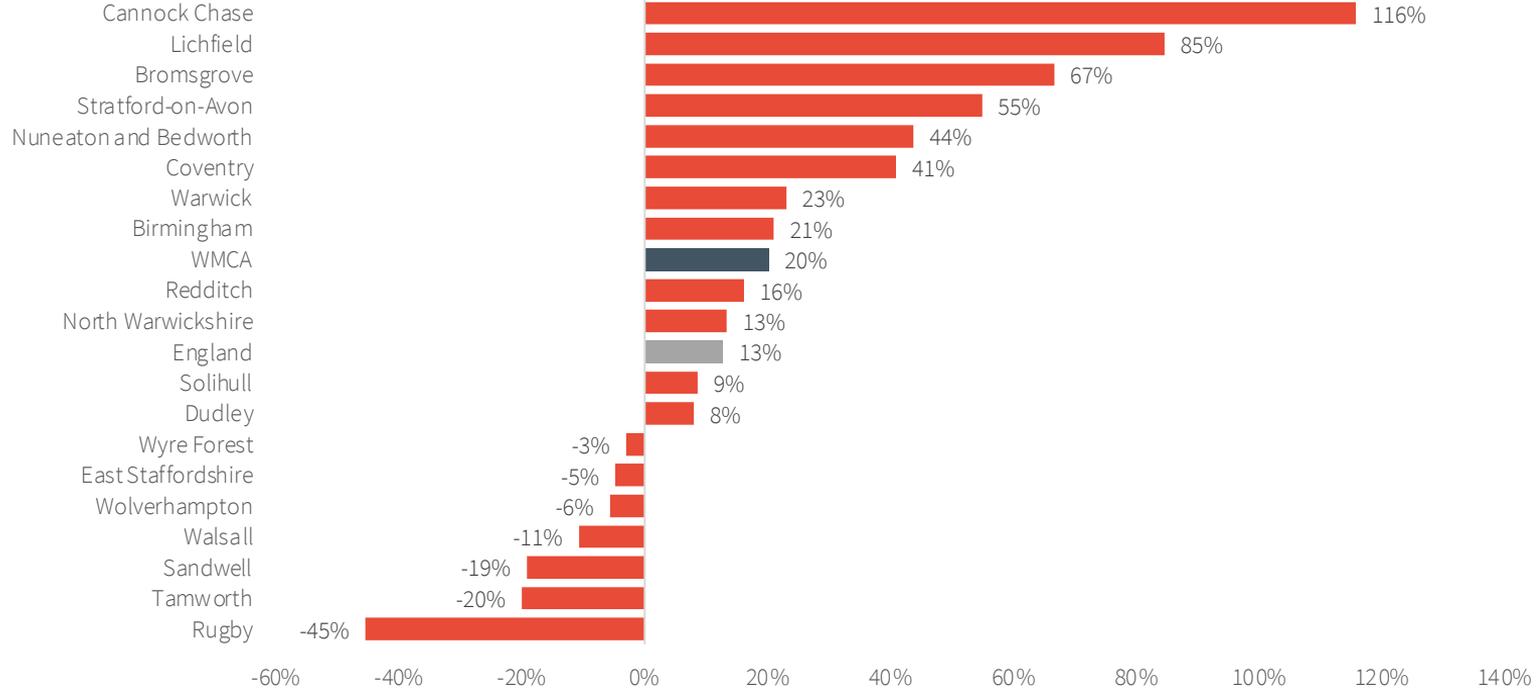
A rapidly growing sector in WMCA area over the last few years, outperforming nearly every sector...

Employment Growth by Sector, 2014-19



Many LAs experiencing cultural employment growth...

Cultural Employment Growth by LA, 2014-19

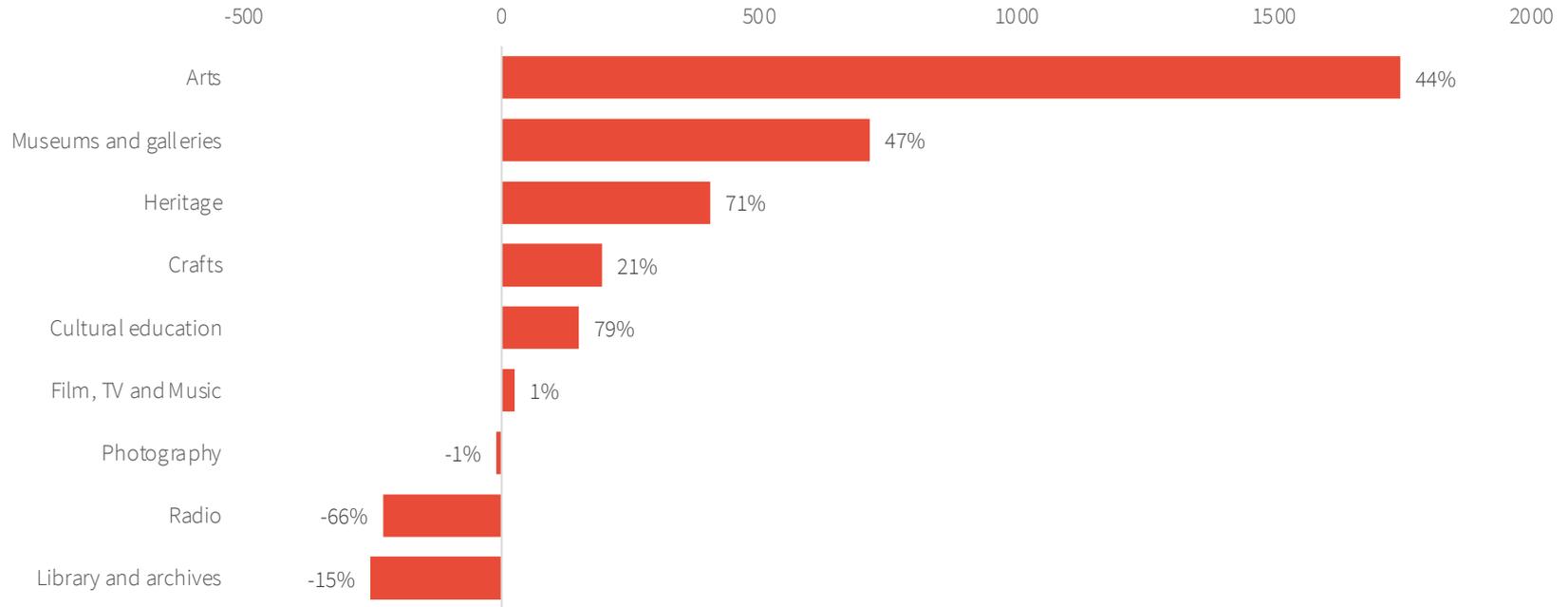


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Note: data does not include freelancers

Strong growth across a range of sub-sectors...

Cultural Employment Growth by Sub-Sector, 2014-19

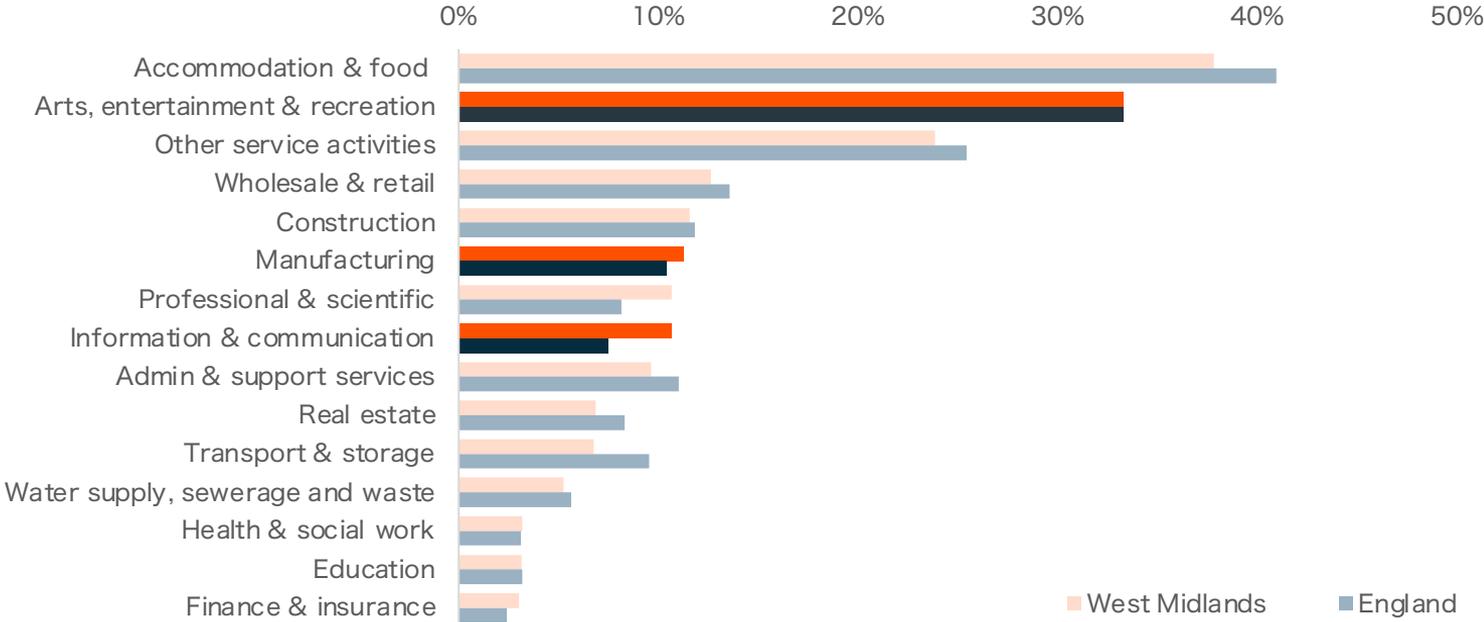


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Note: data does not include freelancers

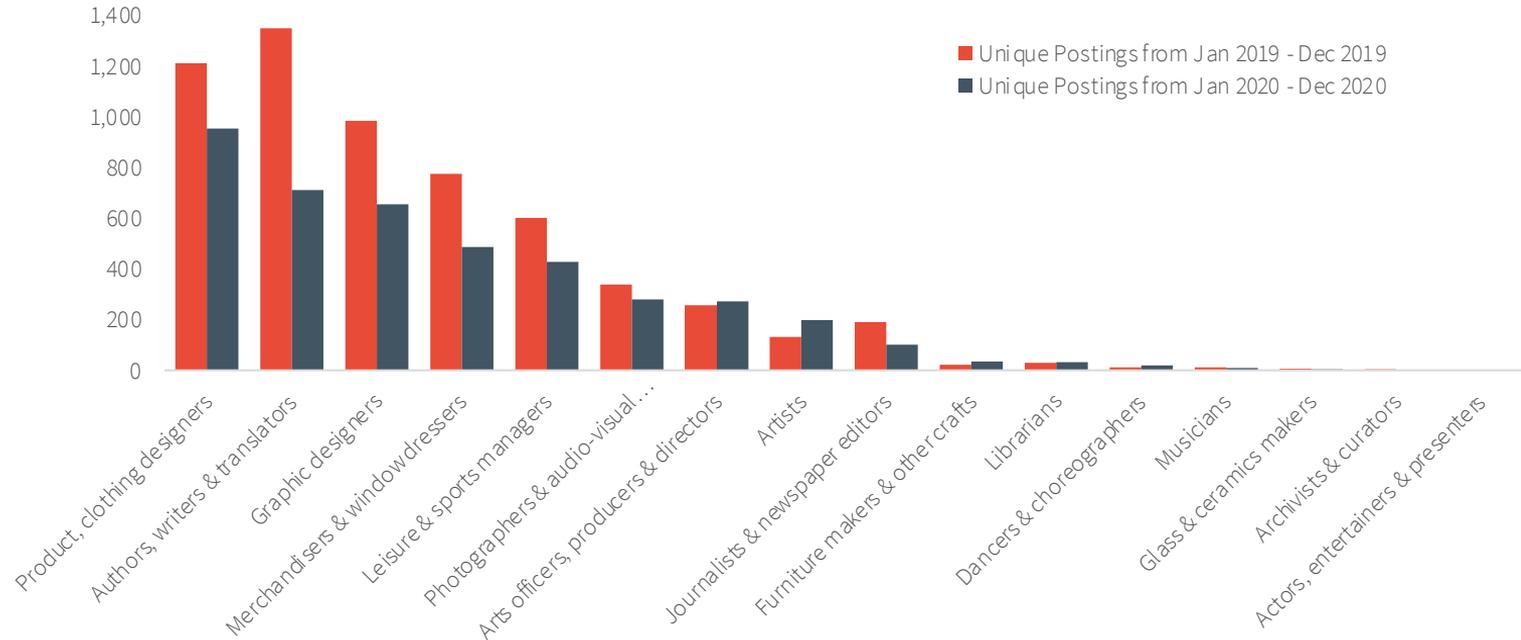
But COVID-19 has had a significant impact on the cultural sector...

Take-up of Coronavirus Job Retention Scheme by Sector, December 2020



And has led to a decline in the number of cultural-related job postings...

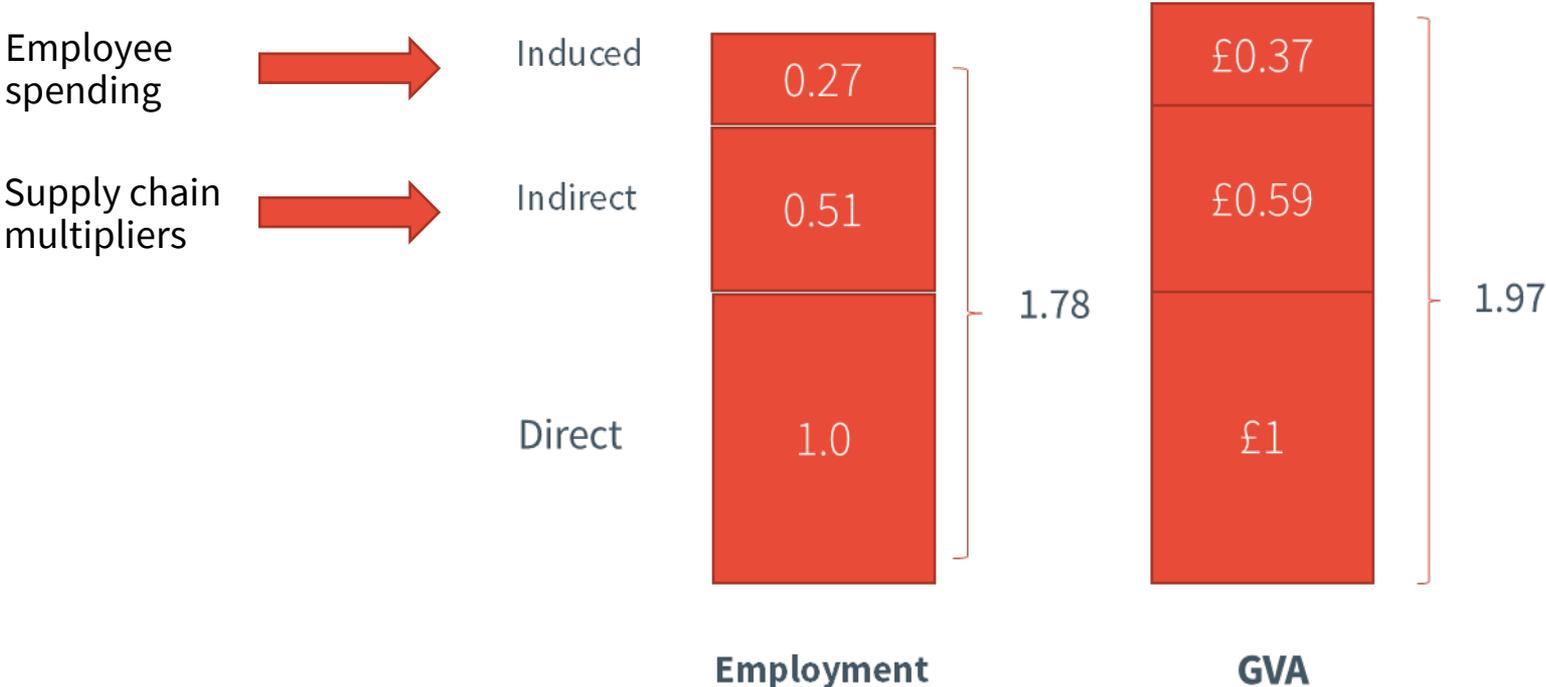
Unique Job Postings within the West Midlands for Cultural Occupations





Economic Contribution

The sector has significant spillovers on other parts of the economy



0.78 of a job in other sectors for every 1 direct job in cultural sector

Direct

- **12,800** FTEs (*16,320 jobs*)
- **£560m** GVA impact

Indirect

- **6,500** FTEs
- **£335m** GVA impact

Induced

- **3,450** FTEs
- **£215m** GVA impact

Total

- **22,700** FTEs
- **£1.1bn** GVA impact (*1.2% of the WMCA economy*)

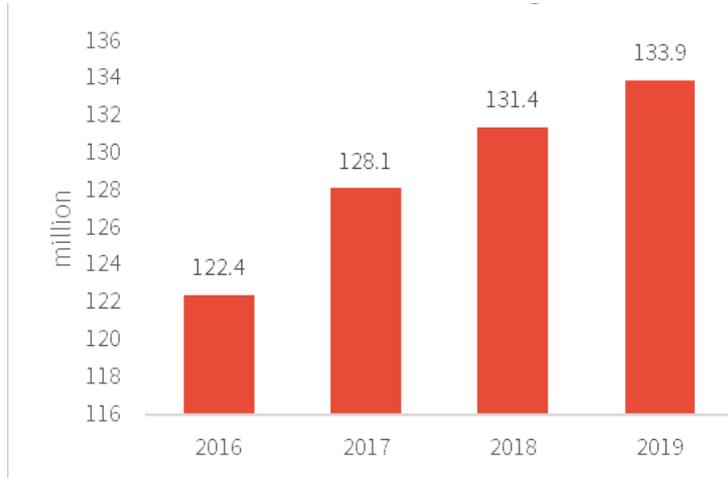
Note: similar orders of magnitude to those in CEBR report for West Midlands region (slightly different sector definition)



Cultural Tourism

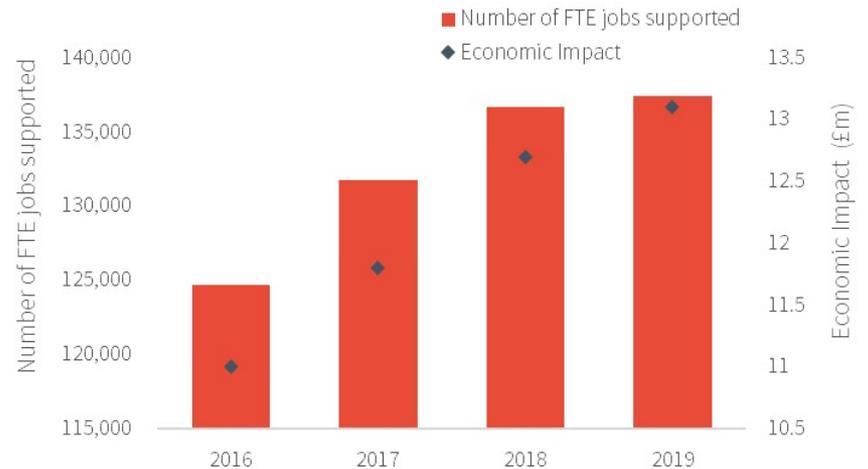
All tourism in WMCA

Visits



- 134 million tourist visits to WMCA in 2019

Spend



- Supporting 137k jobs and £13.1bn visitor spend

Cultural tourism activity

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

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

Source: West Midlands Growth Company Visitor Survey 2019, WMGC

Note: Cultural activities have been highlighted blue

- Culture the primary purpose of visit for **over one in five visitors** to the West Midlands (21%)
- Estimate c.**28 million visits** to WMCA area in 2019 were attributable to culture.

Cultural tourism impact

- **£2.3 billion of visitor expenditure** is attributable to cultural tourism in the region.

...Cultural tourism generates in the order of **40,000 jobs** and **£1.8 billion** in GVA.

Equivalent to:

- **1 in 47 jobs** and **£1 in every £55 of GVA** in the WMCA area.
- **c.29%** of the visitor economy in WMCA area



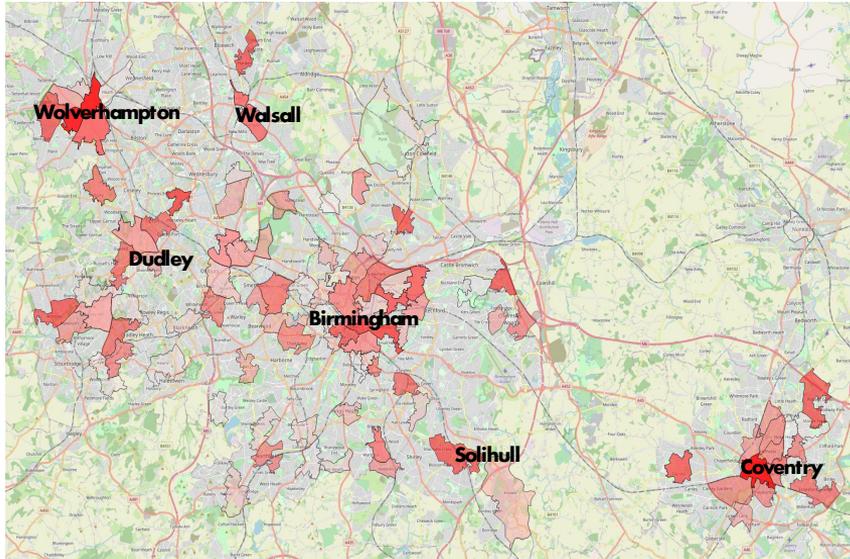
Further & Higher Education Provision

Further Education Provision

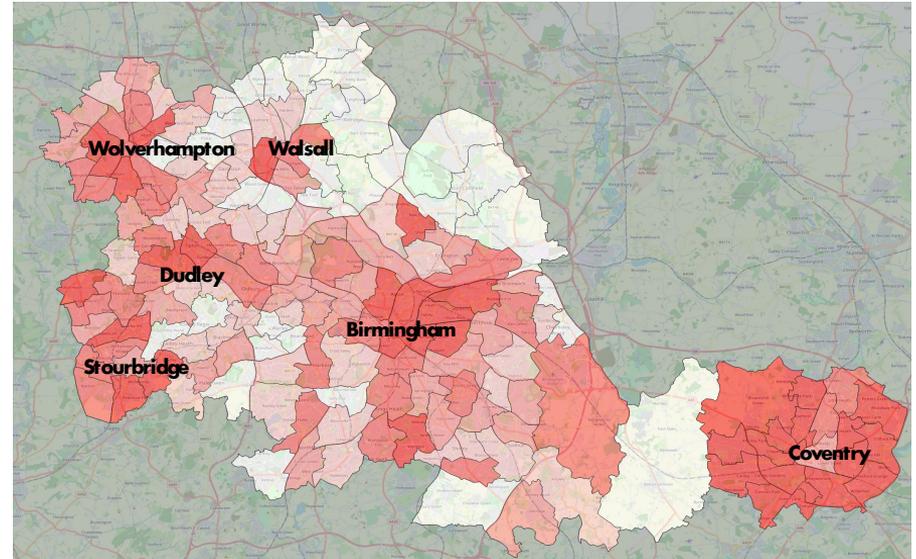
- **5,500 students** enrolled in cultural-related further education courses in the WMCA area
 - 4,155 pupils were enrolled in Crafts, Creative Arts & Design
 - 1,305 in Performing Arts
- **81%** of students are female

Good provision of cultural-related courses across WMCA area; particular concentrations in urban areas

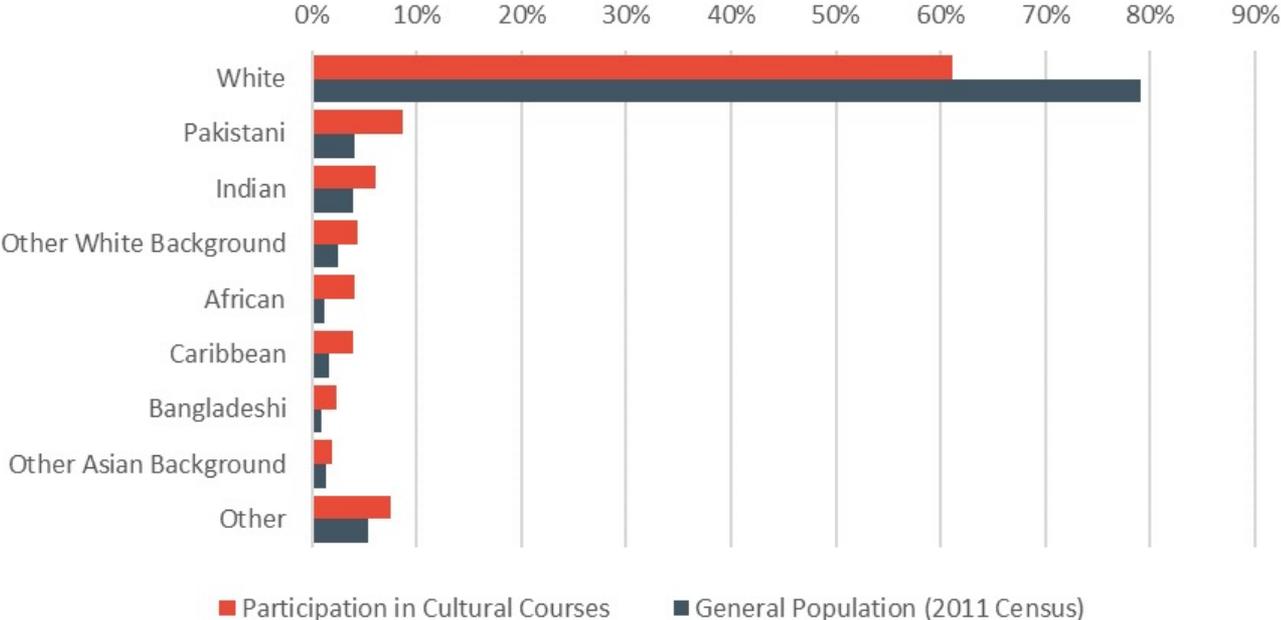
Location of Providers



Location of Learners

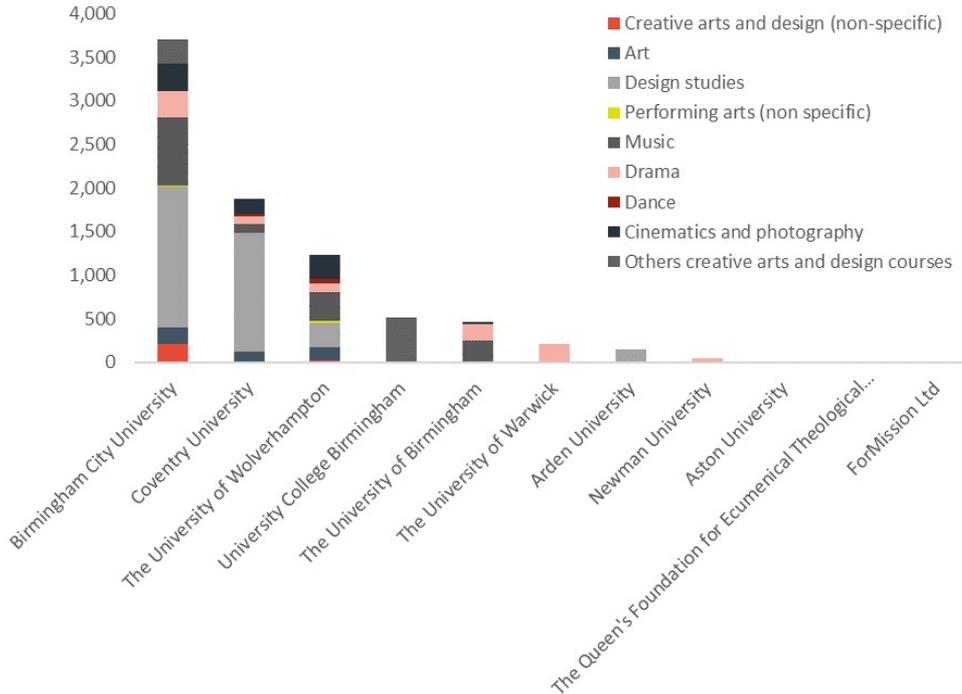


Strong representation of students from ethnicities typically less well represented in the cultural sector



Higher Education Provision

HE Student Enrolments in Creative Arts & Design Courses in 2019/20



- **8,200 people** enrolled in cultural HE courses in WMCA area
- Birmingham City University the largest provider – **45% of cultural-related courses** in WMCA area
- **Design studies** the most commonly applied for course, followed by drama, music, cinematics & photography and fine art
- Applications to cultural courses relatively steady over past decade in West Midlands, but have declined 20% since 2015 in line with national trend
- Across all sectors, net outflow of graduates, with greatest loss of graduates to London & South East



Social Value



Health & Wellbeing



Skills Development



Value of Volunteering



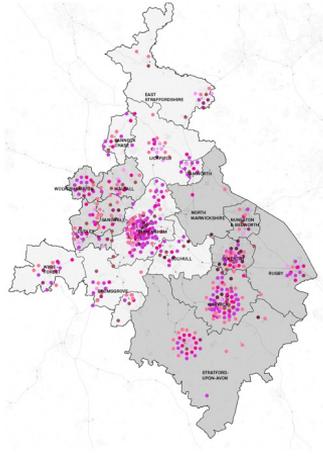
Attractiveness & Distinctiveness of Place



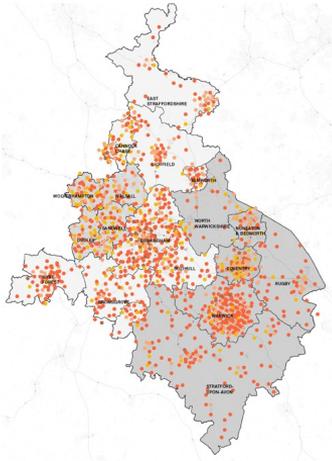
Widening Access & Participation

+ Cultural infrastructure mapping

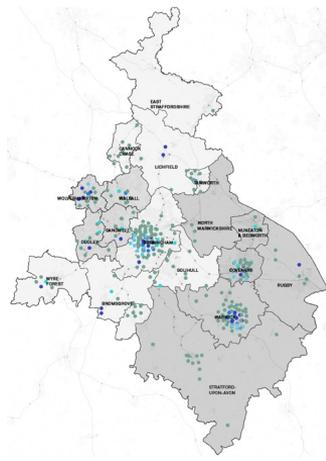
Mapping



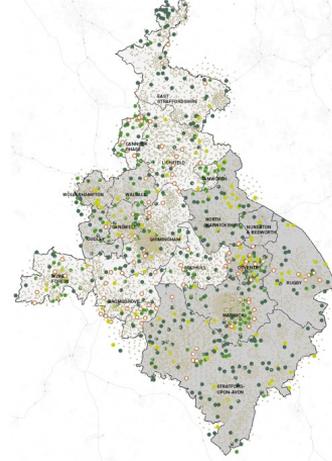
514 Performance & Exhibition spaces



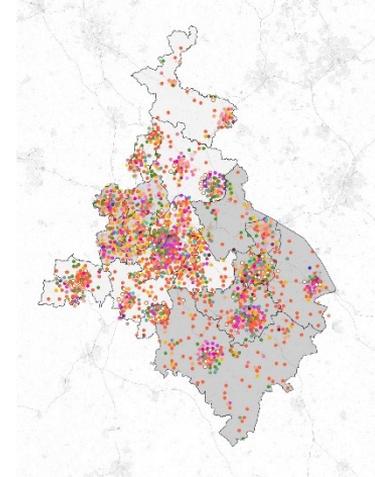
1,274 Community, Participatory & Education spaces



295 Open creative workspaces



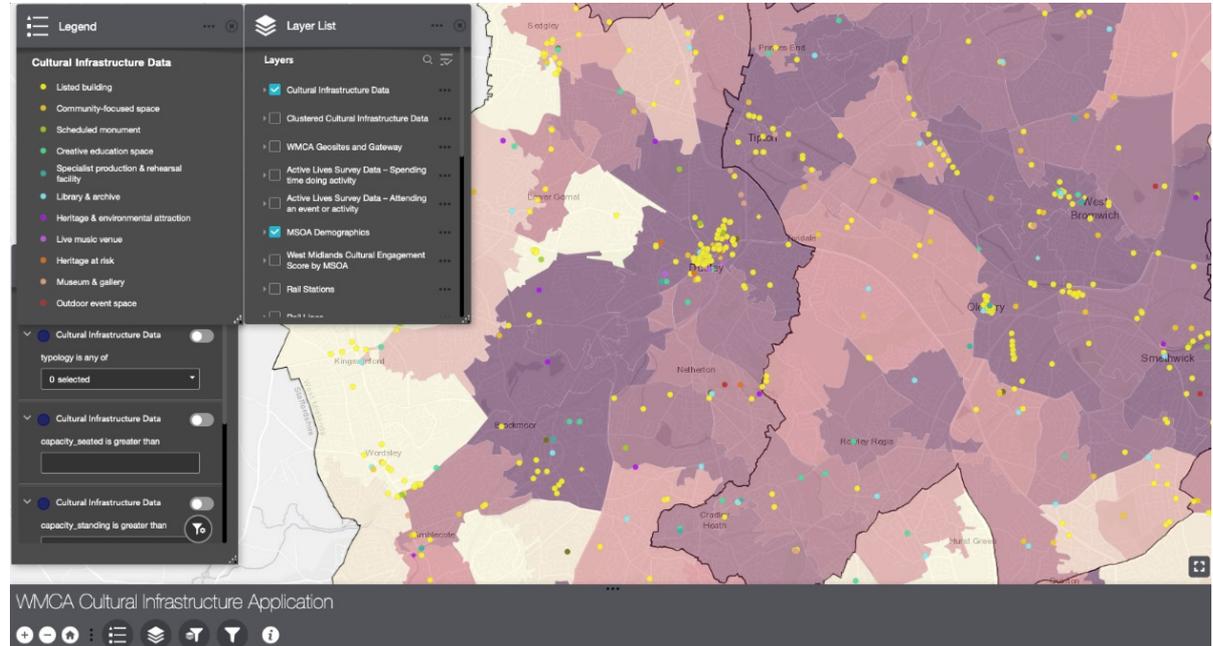
11,300 Environment, heritage and outdoor spaces



2,138 spaces hosting and supporting cultural and creative activities and initiatives regularly

WMCA Cultural Infrastructure Mapping tool

- The online mapping tool contains different layers, including:
 - Cultural infrastructure data
 - Cultural participation data
 - Transport data
 - Socio-demographic data
- Data can be downloaded
- New entries can be suggested
- Map and data to be updated regularly, and new layers and information can be added to it.





Possible areas for future research

Evidence gaps to consider for the future

1. Better capturing the role of **freelancers and micro-enterprises** in the sector
2. More systematically capturing the value of **cultural tourism**
3. Opportunity to investigate **diversity** in the sector in more detail
4. Assessing the role and value of **individual institutions** in the region
5. Opportunity for regular **survey of cultural institutions** in the area
6. Qualitative evidence gap on the **impact of COVID and Brexit** on the sector



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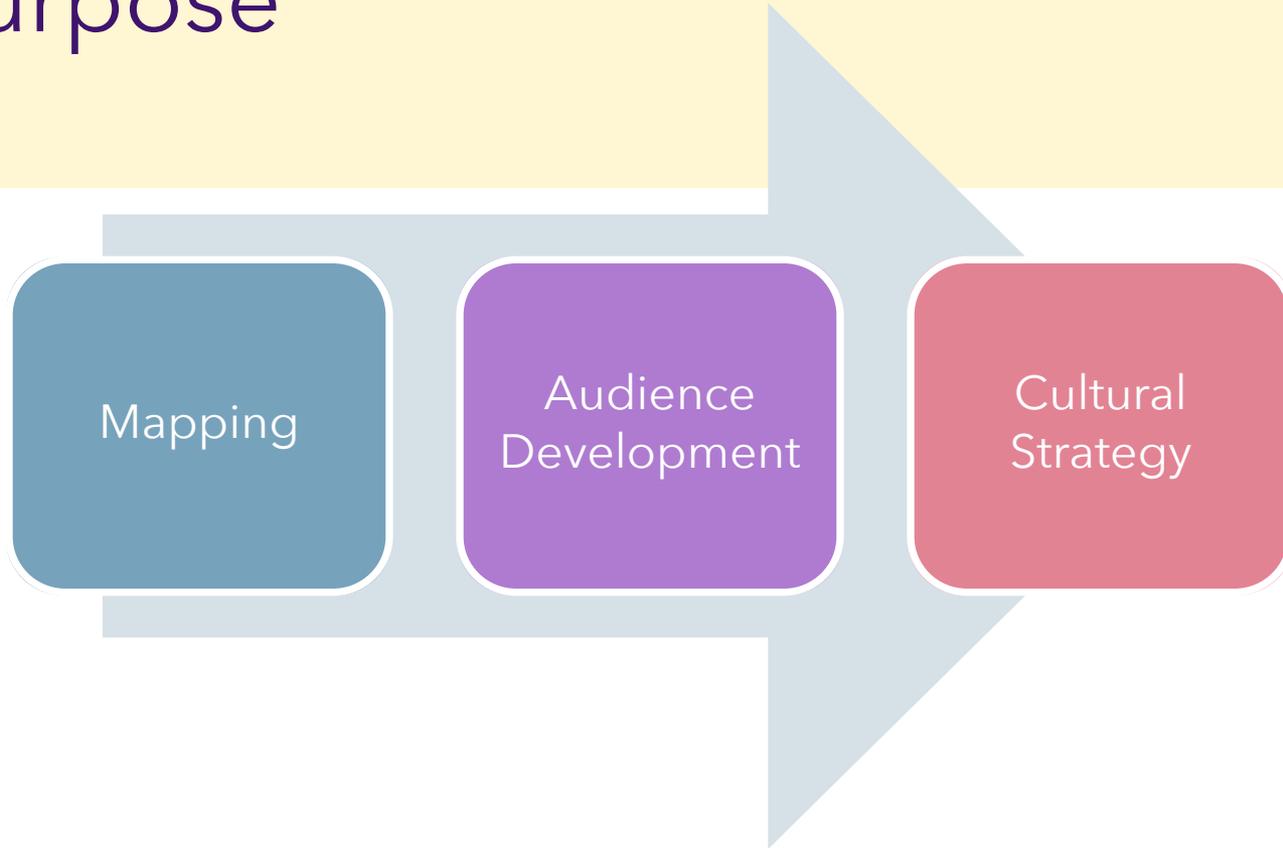
Katy Raines

Partner & Co-Founder, Indigo

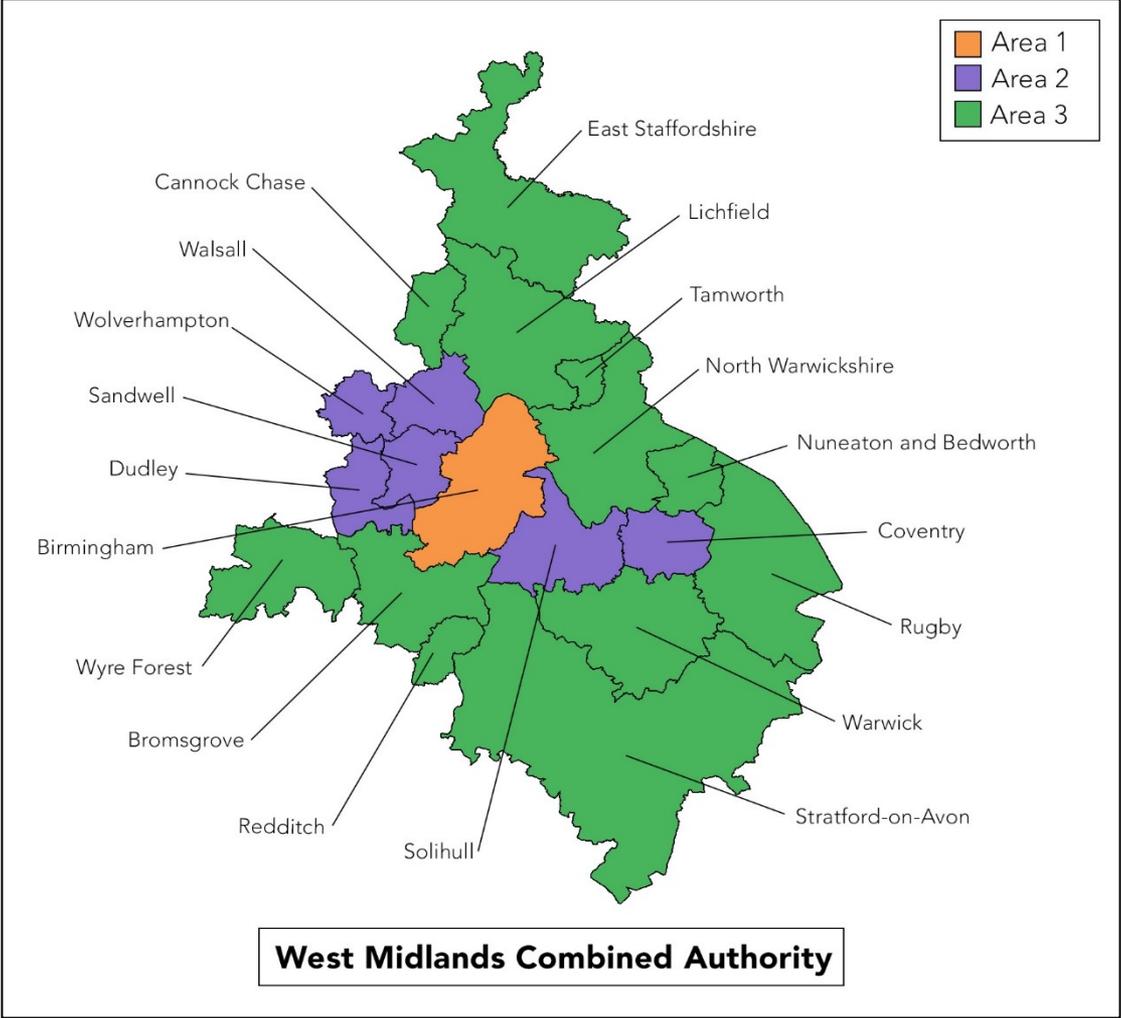
Identity-Confidence-Connection

Audience Analysis, Mapping and Strategy
COVID recovery to the Commonwealth Games and beyond

Purpose



Geographical Scope



Population Profile - Summary

- Age = younger
- Families = more
- Ethnic Group = more diverse
- Social Grade = lower
- Level of Education = lower
- Economic Activity = lower

What does this mean for Culture?

- **Ethnic Group = more diverse**

Ethnicity	
White	79%
Mixed	89%
Asian	60%
Black	69%
Other	67%

- **Social Grade = lower**

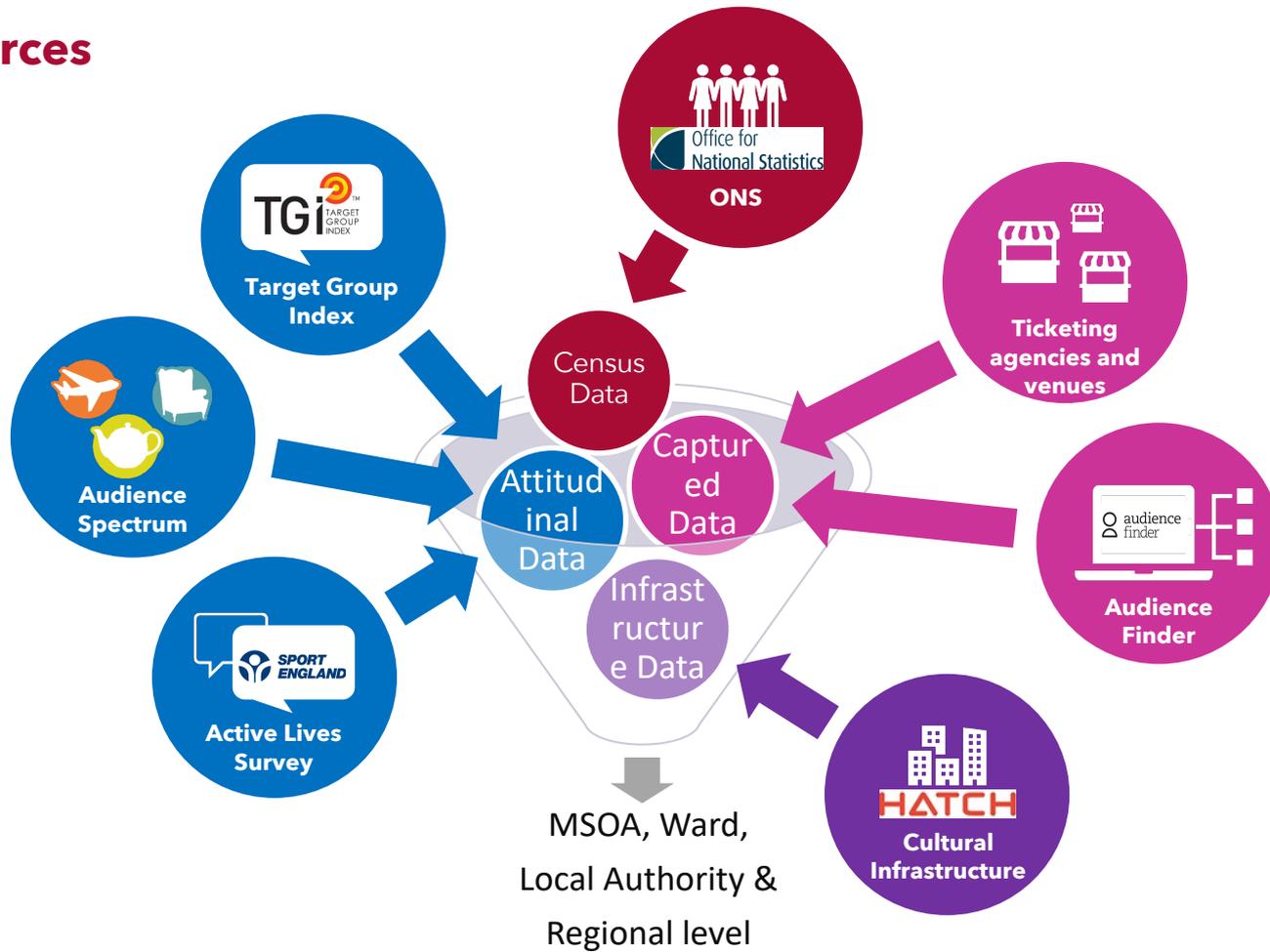
Socio-Economic status	
ABC1	85%
C2DE	67%

The WM Place Profiler

BAKER**R**ICHARDS

- A data visualization tool
- Brings together different sources of data
- A single picture of cultural engagement
- Allows granular comparison/analysis
- Commonality of purpose
- Challenge 'norms'

Data Sources



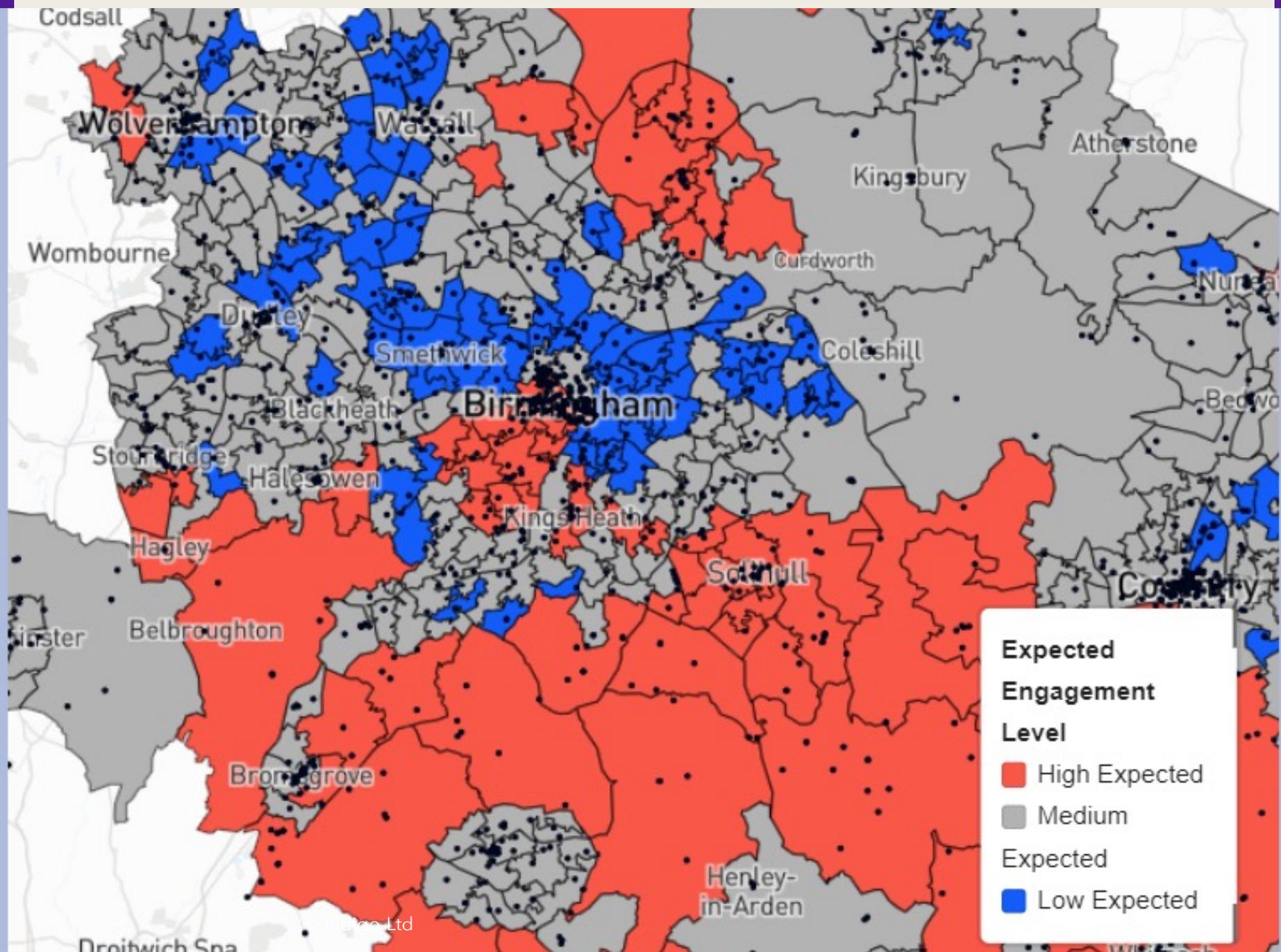
MAPPING: Key findings:

- **Lower levels of cultural engagement** than England
- Engagement strongly correlates with **low educational achievement** and **socio-demographic** profiles
- Clear differences between areas of 'high cultural benefit' and 'low cultural benefit'

MAPPING: Key findings:

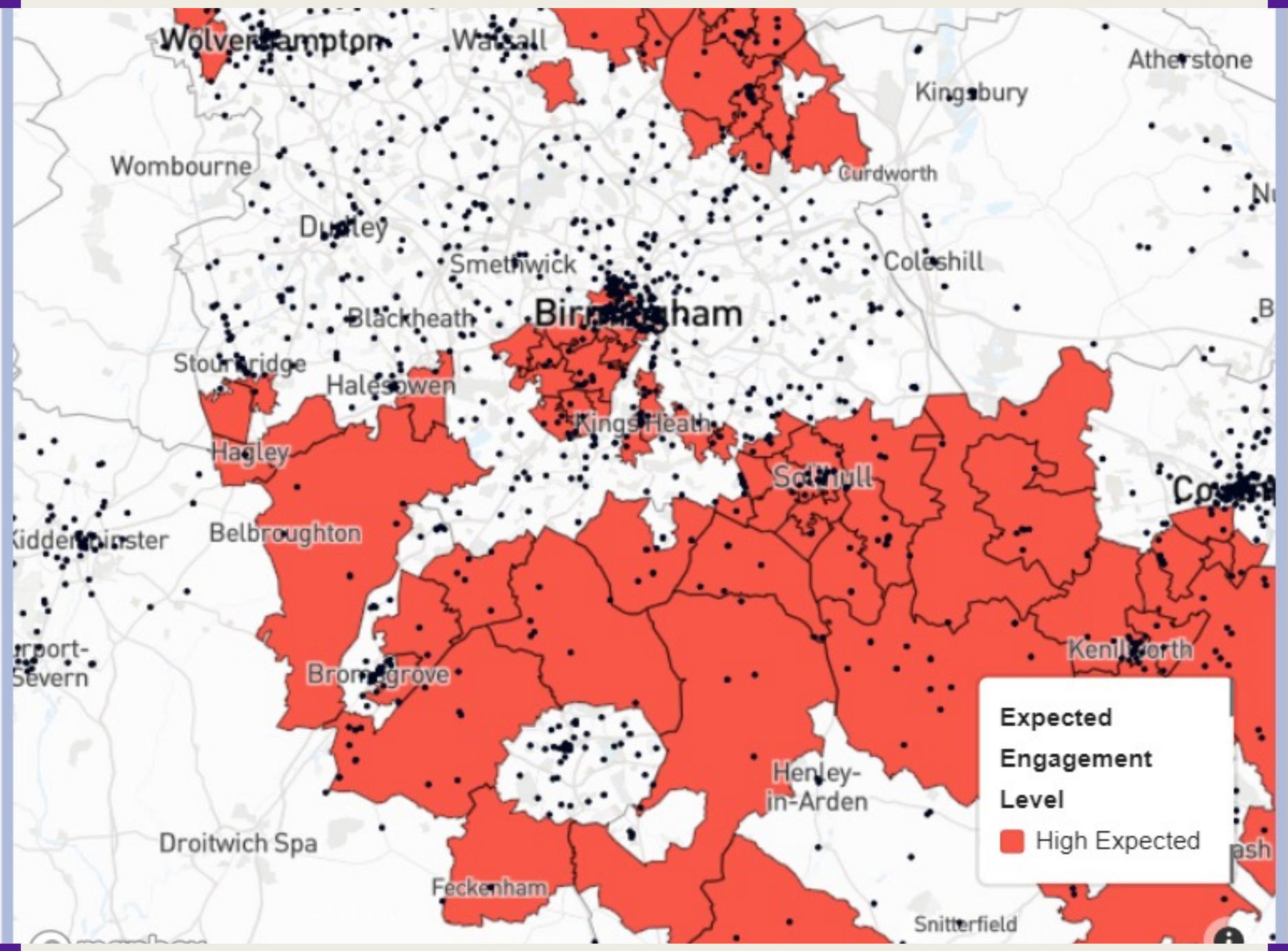
- And between areas where population is predominantly **white**, and more **mixed** areas.
- Some local areas have an **active creative scene**, despite low levels of infrastructure or engagement in 'formal' culture
- Other areas have highly engaged cultural population, who choose to **attend elsewhere** (not WM)

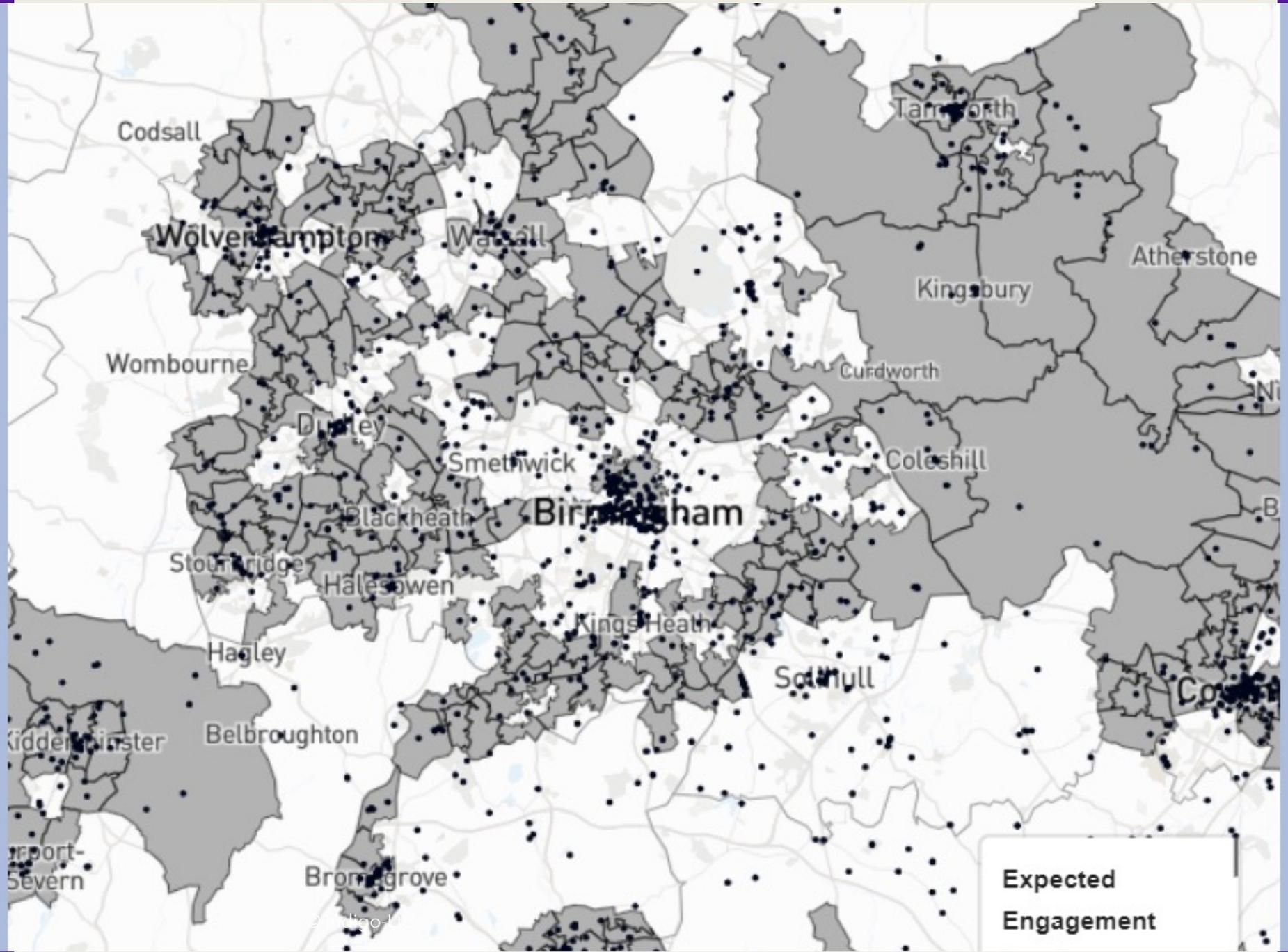
Group 1 (all types)	Group 2 (all types)
Predominantly white, slightly older than average, living in (less urban) areas of lower deprivation.	Younger than average, multiple heritages/races, living in city-based areas of higher deprivation than group 1.
Low Engaged	
<p>70% population C2DEs</p> <p>Medium proportion of 'no qualifications'</p> <p>Higher proportion of dependent children</p>	
Medium Engaged	
<p>Half population C2DEs</p> <p>Medium proportion of 'no qualifications'</p>	
Highly Engaged	
<p>High proportion of Social Grade ABC1s</p> <p>Lower than average proportion of 'no qualifications'</p> <p>Lower than average dependent children</p>	

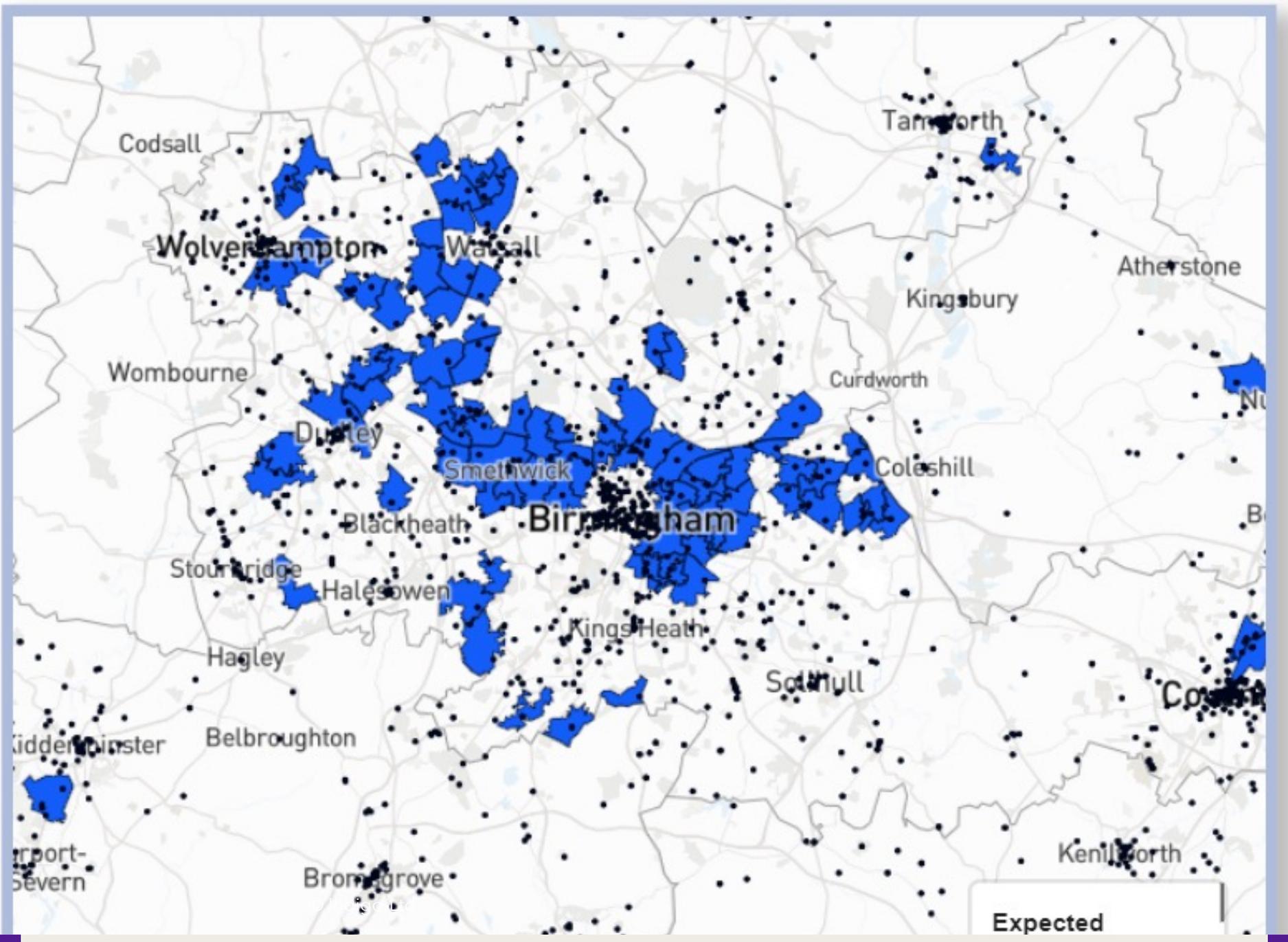


Expected Engagement Level

- High Expected
- Medium Expected
- Low Expected







Expected

Audience Development

- Consultations with Bham 2022 team
- Workshops / sessions with a range of cultural organisations and practitioners
- Conversations with stakeholders
- Desk review of case studies, examples of creative practice across the region

AUDIENCE DEVELOPMENT: Key Recommendations

3 themes:

- Identity
- Confidence
- Connection

3 types of audience:

- Limited
- Social
- Unlimited

3 Themes

IDENTITY

Relevance

People
Like Me

Spaces
and
Places

Trust and
Relationships

Global
shared
humanity

High
Quality

Timing

Covid-
safe return

Cost

CONNECTION

Trying
new
things

CONFIDENCE

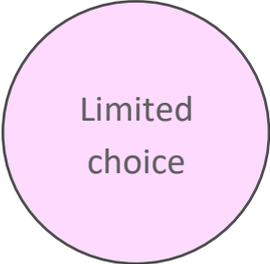
Sharing and
Celebrating

Feeling
welcome

Safety and
Belonging

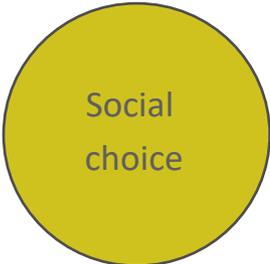
Transport
and
Access

3 Audience Segments



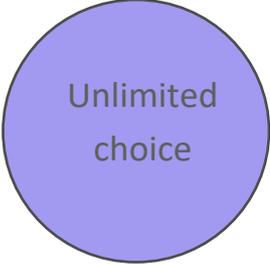
Limited
choice

- Less access to culture
- Limited by transport, location, cost - identity, relevance, feeling safe
- Most financially affected by Covid



Social
choice

- Cultural choice influenced by social / family / community priorities
- Range of spaces used including 'non cultural' spaces



Unlimited
choice

- Traditionally had most access to culture
- Attend a range of events in WM, as well as elsewhere, esp. London
- Cultural choice based on personal interests and perceptions of quality
- Least financially affected by Covid

Audience Development Framework

	Identity	Confidence	Connection
Limited	<ul style="list-style-type: none">• Familiar Spaces and Places• People Like Me• Relevant images/language	<ul style="list-style-type: none">• Transport, access and cost• Reminder of the importance to them of creativity	<ul style="list-style-type: none">• Community focused• Celebration of communities• Global connections

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Social	<ul style="list-style-type: none">• Events with wide appeal for family/social groupings• Strong WM identity• Inclusive welcome	<ul style="list-style-type: none">• Make time to try something new• Don't miss out (FOMO)	<ul style="list-style-type: none">• Socially focused• Everyone's welcome• Large scale celebration of diversity

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Unlimited	<ul style="list-style-type: none">• Signature cultural events• New and Ground-breaking artistic projects	<ul style="list-style-type: none">• Promote artistic quality• National / international recognition of the WM	<ul style="list-style-type: none">• Relationships with existing cultural organisations as gateways

Issues for the sector:

- Reframing definitions of Culture and Creativity
- Disparate Communities
- Re-centering and revaluing the region
- Investment in infrastructure or activity?

Q&A

West Midlands Cultural Sector Research

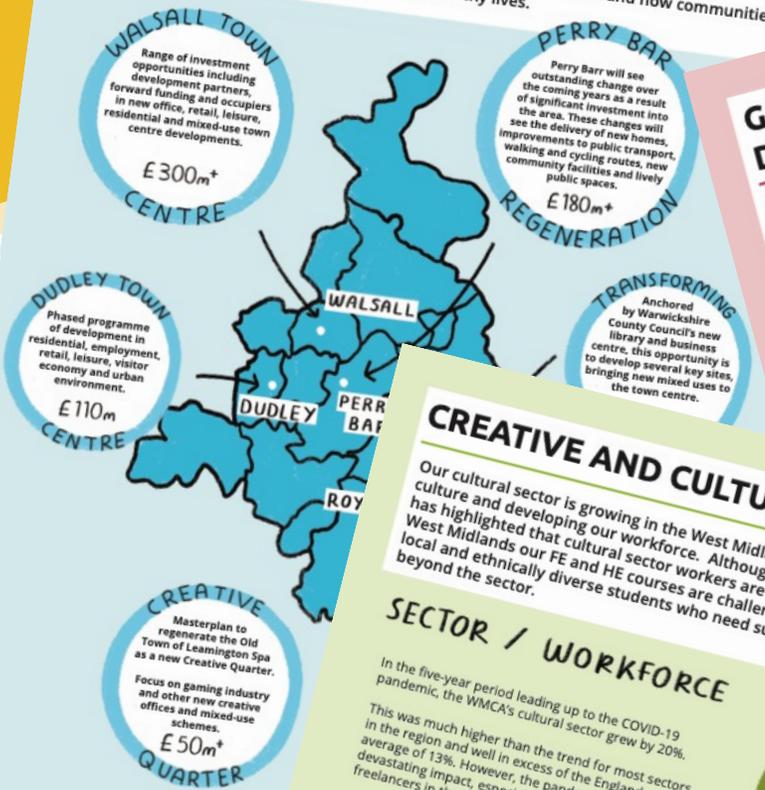
Infographics & Provocations

West Midlands Cultural Sector Research

- Culture Central -

NEW & RENEWED PLACES

There are significant investments being made across the region that are creating and renewing the places where people live. Policymakers, local authorities, community groups and businesses are increasingly interested in culture and creativity, and we need to ensure that our collective knowledge is central to conversations around how communities are created and supported to live happy and healthy lives.



GRAVITATIONAL PULL & OUTDATED DEFINITIONS

Physical cultural infrastructure and investment is concentrated in areas with higher socio-economic status and higher levels of cultural engagement. This does not mean that cultural activity only happens in these places, but that investment and infrastructure often is not attuned to the lived cultural experiences of the people and places of the region.

The incorporation of cultural infrastructure venues into our analysis has shown that there are significant differences in the built cultural provision, which is concentrated in areas with the highest expected engagement and higher economic status.

Whilst this area needs much further investigation, it does question how resources may be re-aligned in the future to support and recognise communities, particularly given that we know that creative and cultural activity in lower engaged communities tends to happen in less traditional spaces and places.



RE-CENTERING & REVALUING THE REGION

Outdated perceptions of the region prove a significant challenge to our ability to attract investment and create jobs. We are working to re-position the region as a place to be proud of and visit.

Our analysis clearly suggests that there are significant proportions of people, particularly on the edges of the region, who are highly culturally engaged, but don't see Birmingham and the West Midlands as a valued cultural destination of choice.

Many travel elsewhere (London) for cultural opportunities to re-position capital is important for residents.



Cultural tourism generates 40,000 jobs and £1.8 billion in GVA. Which is 1 in 47 jobs and £1 in every £55 of GVA in the WMCA area.



2.8 million people live in the WMCA area.

Data taken from the West Midlands Cultural Sector Research Project. A partnership between Birmingham 2022 Commonwealth Games, Coventry City of Culture Trust, Birmingham Growth Company and Culture Central. The project received funding from Arts Council England.

CREATIVE AND CULTURAL JOBS FOR ALL

Our cultural sector is growing in the West Midlands, creating opportunities through culture and developing our workforce. Although there is significant growth, research has highlighted that cultural sector workers are not representative of society. In the West Midlands our FE and HE courses are challenging this trend, supporting many local and ethnically diverse students who need support and opportunities within and beyond the sector.

SECTOR / WORKFORCE

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



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

TALENT / CAREER DEVELOPMENT



COVENTRY CITY OF CULTURE 2021

The city is estimating an additional 2.5m VISITORS to Coventry in 2021/22 to attend events as part of the City of Culture.

BRITISH ART SHOW

The British Art Show is the biggest touring exhibition of contemporary art in the UK. The tour will stop at four locations across the UK, including Wolverhampton between January and April 2022.

COMMONWEALTH GAMES

DISPARATE COMMUNITIES/ INTERSECTING IDENTITIES

Traditional understandings of cultural engagement are changing. Class, age and place all intersect forming a challenge to the way we think about cultural engagement with publicly funded culture.

Our research highlights two distinct groups in the region - patterns of engagement highlight two distinct groups. Engagement with culture cannot be simplified into a single narrative. Engagement with publicly funded culture at three different levels; limited choice. Engagement with culture cannot be simplified into a single narrative.

GROUP 1

White, slightly older, living in (less urban) areas with high deprivation.

GROUP 2

Younger than Group 1, diverse, living in areas with high deprivation.



UNLIMITED CHOICE

Places like: HALL GREEN, Moseley / Kings Heath, Walsall / Paddock Heath, COVENTRY CITY OF CULTURE

FOUR OAKS, STREETLY, Lichfield/ Highfield.

Data taken from the West Midlands Cultural Sector Research Project. A partnership between the West Midlands Combined Authority (WMCA) & WMCA Cultural Leadership Board, Birmingham 2022 Commonwealth Games, Coventry City of Culture Trust, Birmingham City Council, Greater Birmingham & Solihull Local Enterprise Partnership, West Midlands Growth Company and Culture Central. The project received funding from Arts Council England.

Roundtables

West Midlands Cultural Sector Research

What's does this mean for your organisation?

What would change look like?

How can we work collectively in response?

– Culture
Central –

Thank you



Feedback:

<https://forms.office.com/r/usYAgdQfun>