UNLOCKING THE POTENTIAL OF CULTURE, ARTS AND HERITAGE IN SOUTH YORKSHIRE

A report to the four South Yorkshire local authorities and Sheffield City Region

July 2020

ChamberlainWalker

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Foreword

Our region has a rich cultural heritage and a history of producing world class artists. South Yorkshire is home to exceptional music venues, galleries, museums, theatres as well as historic heritage attractions.

Despite this, we know that not enough people engage in the arts across the region. We also know that the region is often overlooked as a tourist destination, and there is a lack of funding and investment in arts and culture.

Our region's arts, culture and heritage sectors have been hit particularly hard by the impact of the Covid-19 crisis. With South Yorkshire's music venues, galleries, museums and theatres closed, I'm working hard to ensure these organisations are still there for us when we emerge from the crisis and build capacity for the sector to grow.

Art, culture and music is a powerful vehicle to recovery and renewal, contributing to healthy and sustainable communities and vibrant city and town centres. So now more than ever, we need to recognise the huge contributions that art, culture and heritage make to our economy and our quality of life and, despite the challenges find creative ways to actively strengthen our creative talent and organisations.

This report is an important first step to do that and will provide a previously unseen insight into what the sector already contributes to our economy and our communities and sets out recommendations to unlocking the untapped potential of art, culture and heritage in South Yorkshire.

Dan Jarvis,
Mayor of the Sheffield City Region

July 2020

Authors

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David is a former senior civil servant with roles in DfT (Major Infrastructure Projects), the Prime Ministers Delivery Unit (Housing and Planning Delivery) and DCLG (Planning and Local Economic Growth). In the later role he helped establish City Deals, the Local Growth Fund and the cross-Whitehall Cities and Local Growth Unit. After a period in Local Government (Head of Policy, Performance and Strategy in Newham Council) David is now a Senior Associate at ChamberlainWalker.

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Introduction

This report was commissioned to explore the evidence supporting the case for investment in culture, the arts and heritage across South Yorkshire. **Our key findings are that the Culture, Arts and Heritage (CAH) sector in South Yorkshire;**

- **makes a substantial direct and indirect contribution to the local economy (£200m GVA and 6,400 jobs);**
- **has significant wider economic and social benefits including supporting tourism, creative industries, health, education, community and individual wellbeing. These contribute at least a further £170m to the local economy and £1.2bn in individual wellbeing;**
- **receives much less public funding from both central and local government than both comparable city regions and England averages;**
- **has been badly hit by Covid-19 pandemic but is well placed to play an important role in the economic recovery plan and deliver those significant economic and social benefits.**

As well as highlighting the many benefits of investment in the sector, we also make recommendations on structures and governance at City Region level to make investment and other interventions effective.

The focus on the city region is important because it is widely recognised that innovation and the subsequent economic growth is driven at city region level. City regions offer access to large markets, specialised and skilled labour pools, and concentrations of activity, while urban proximity and connectivity helps knowledge networks to form, increasing the flow of innovative ideas and new products. The most successful cities have a thriving culture, arts and heritage sector because it attracts and retains skilled people, because it fosters creative skills and innovation and builds community, identity and wellbeing – as well as being an economic activity in its own right.

We hope this report will be an important step towards creating a strategy for investment in the CAH sector which will maximise not only the potential economic benefit but also community and individual wellbeing. This applies in both the long term and immediately, as communities recover from the Covid-19 pandemic and its economic consequences.

Wentworth Woodhouse, Rotherham. GAIA by Luke Jerram. Photographer: James Mulkeen

"Investing in culture and the creative sector as a driver of social development can also lead to results that contribute to the overall wellbeing of communities, individual self-esteem and quality of life, dialogue and cohesion"

UN Report on Creative Economy 2013

Methodology

This study brings together a wealth of data on the CAH sector in South Yorkshire. For the purposes of this report we have used a relatively tight definition of the sector (further details on page 14 and annex A). This includes performing arts, cultural education, artistic creation, museums, historical sites and buildings, zoo, garden and nature reserve activities. This means that we have excluded creative industries (advertising, film making, digital etc), sport and leisure and the visitor/night-time economies.

All the data is from before the Covid-19 pandemic so is of course subject to change depending on how the recovery from the pandemic pans out.

We have interviewed a range of stakeholders including those working in the sector and Officers in Local Authorities, in Sheffield City Region and Central Government and its agencies.

We also commissioned an online survey of businesses in the sector. The survey provides a wide range of qualitative and quantitative evidence. Further details are presented in annex C.

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Survey sample size

	#	%
………………Sheffield	46	52
………………Barnsley	18	20
……………Doncaster	12	14
…………..Rotherham	9	10
..Multiple locations	3	3

Executive Summary

The Culture, Arts and Heritage Sector in South Yorkshire

South Yorkshire has a rich and varied Culture, Arts and Heritage (CAH) sector with assets across the region. Key strengths on the arts side include a strong music and theatre presence, particularly in Sheffield. In Heritage there are important industrial heritage assets alongside historic houses and other heritage sites and excellent museums. This is all underpinned by the exceptional landscape of the region.

While **the size of the CAH sector is about average when compared to similar city regions** (0.4% of the local economy, £100m GVA), our analysis has highlighted some notable characteristics which are important when looking at what interventions might help to realise the full economic benefits.

- The sector is **heavily weighted towards the museum / heritage / landscape side (41%) as opposed to the arts and entertainment side (27%)**.
- **Employment is low relative to other city regions**. West Yorkshire supports nearly twice the number of jobs even though sector GVA is only slightly higher. The reasons for this are not clear but may be linked to differences in sector and business composition, and productivity.
- Businesses **in the sector are overwhelmingly small** (turnover less than £50,000, zero or less than 10 employees) but with high levels of volunteering (78% of organisations in our survey employ volunteers).
- 41% of sector businesses **are extremely or highly reliant on public funding**.

The last point is important because **public funding for the sector in South Yorkshire is significantly lower than both national averages and in equivalent city regions**. The National Lottery Heritage Fund is providing £18 per head (average across the North £30 per head) and Arts Council England is providing £15 per head (average across the North £27 per head).[1] It is also true for local authority funding where net expenditure per head is £28 compared to £34 across England and £42 in West Yorkshire and £32 in Greater Manchester.

The economic (and wider) impact of CAH

The economic impact of this sector is significant and should be considered a key economic driver in its own right, alongside other economic sectors in South Yorkshire.

- The **direct economic impact** is £100m GVA and 3,000 jobs.
- Spending by those employed in the sector and/or supply-chain businesses adds to demand for goods and services in the area. These **Indirect and induced economic effects** deliver a further £100m GVA and a further 3,500 jobs.

Beyond these impacts the CAH sector brings a range of wider social and economic benefits. These benefits are all real and have a good evidence base. Only some of them are quantifiable, however irrespective of quantification, they all need to be fully taken into account when considering proposals to intervene / invest in the sector.

[1] The Arts Council England number only includes funding to National Portfolio Organisations and National Lottery Project Grants

- We estimate there are **50,000 volunteers working in the sector** whose economic contribution will not show up in standard economic data. A conservative valuation of this contribution is £50m per annum.

- The CAH sector attracts significant **investment from national funding bodies** both public and private. These provide an additional boost to the local economy in the order of £25m per annum.

- CAH also supports other sectors that are important for growth in the wider local economy. These include:
  - **tourism** where culture is linked to 42% of tourism expenditure and where South Yorkshire is behind other city regions for both visitor numbers and spending;
  - **the night-time economy** which is the UK's fifth-biggest industry and linked to culture, performance and entertainment;
  - **creative industries** where evidence shows that a strong cultural and heritage offer supports growth in what is the fastest-growing sector in the UK. Sheffield has been identified as a creative industry cluster with 1,825 businesses (7.5% of total) with 6,873 jobs (2% of total).

- There are also more generic economic benefits from the CAH sector including **agglomeration benefits and placemaking.** Skilled workers and investors will sacrifice higher earnings to locate in areas with lots of cultural activity – and access to talent is a key success factor in economic growth, especially in growing creative and digital clusters.

- There are well evidenced **positive impacts on wellbeing** from participation in CAH which has been quantified at between £1,000 and £2,000 per person per year. This suggests that CAH activities in South Yorkshire generate personal wellbeing benefits of around £1.2bn annually for residents. Participation rates in South Yorkshire are relatively low so there is potential to increase this benefit in future.

- Studies have found a positive relationship between engagement in CAH activities and **good health**. As well as individual wellbeing there is evidence of annual cost savings to the NHS of £10m or more.

- The CAH sector plays an important role in **education** and improves educational aspirations, attendance, and performance. There is also a big impact on young people's soft and transferable skills. The CAH sector in South Yorkshire could increase the numbers going into further education by 250-500 people, with an economic benefit of £85m (net present value).

- There is strong evidence that CAH **builds stronger communities**. Cultural organisations bring together different social or generational groups, building trust, increasing interaction and allowing people to share knowledge, skills and fun. They establish meaning, belonging and purpose and encourage a sense of identity.

The potential for CAH in South Yorkshire

Clearly the potential to grow the CAH sector and the direct and indirect benefits that flow from that will depend on the strength of individual proposals and interventions. However, our analysis shows that there are some important general opportunities.

- **General returns** – as noted above every £1 of GVA directly generated in the sector supports significant (£2.70) wider economic and social returns. In addition, there are further economic and social returns that cannot be quantified or captured in the way a traditional financial investment might.

- **Investment leverage** – national funding in South Yorkshire CAH is low and national bodies (public and private) will often look for local investment to provide confidence, prove local buy-in and spread the risk. The extent to which local investment attracts funding and investment from elsewhere is important. The more leverage, the more impact there is for each £1 of local spend.

- **Funding Gap** – bringing national funding levels up to national averages would make a significant difference. Eliminating all funding gaps, whilst sustaining above average areas would lead to an additional £10m per annum.[2] This could be addressed by actively supporting bids with a good track record; better bid coordination; presenting a common narrative and strategic approach; and aligning investment and bids to national priorities.

- **Investment priorities** – It is possible to think about generic investment priorities by taking into account existing funding, national public funding shortfalls, the relationship between public funding of broad sub-sectors and the resulting GVA and jobs and different multipliers for those sub-sectors. Using this we have ranked investment potential in terms of economic impact. This suggests that the best impact comes from
    - Category 1: nature and landscapes; museums with libraries and archives
    - Category 2: theatre; museums; historic buildings and monuments

- **Increasing participation** – participation rates are below national averages in South Yorkshire which means that any concerted moves to increase this offers potential to a) increase revenues, GVA and jobs in the sector and b) increase the wellbeing benefits for residents.

- **Increased tourism** - The number of visitors is also relatively low which suggests that there is potential to increase this.[3] If the strong attractions of the area were combined with a strong narrative and good marketing this could help grow the visitor economy as well as the CAH sector.

- **Supply Chains** - We do not have detailed data on the extent to which the South Yorkshire CAH sector supports local supply chains. However, a concerted effort to promote local suppliers could increase the GVA multiplier for the sector.

The full potential of the sector will never be realised without investment and targeted interventions to make it happen. If the city region aims to get more involved, then based on the analysis above the sort of interventions that are likely to be successful are ones that:

- increase the number / density / clustering of successful, innovative CAH enterprises such as key investments in nature and landscapes, museums, theatre and historic buildings and support for networking and mutual information exchange, innovation etc within the sector.

- leverage national funding by supporting bids with a good track record and aligning bids and investment decisions to national funding priorities.

- support new and existing CAH businesses such as business support, access to finance (including help with coordinating bidding etc), partnerships, collective branding / marketing etc

- support local supply chain development, working with existing CAH business to develop local supply chains, build networks and keep economic benefits within the region

[2] Based on ACE and NLHF investment
[3] This is in terms of absolute numbers of visitors rather than a per capita basis

- boost engagement to generate revenue for CAH businesses and spread the social benefits of participation much more widely

- spread the benefits of the CAH sector around the region to increase community benefits

Unlocking potential - underpinning structures, governance and support

We have established that there is a good rationale for investing in the CAH sector. The economic and wider social benefits are significant and there is a potential in the sector both because of the inherent strengths of the existing CAH assets, and because public funding is currently significantly below equivalent / competing city regions.

However, to be effective investment needs to be underpinned by the right structures and governance at city region level. Looking at structures elsewhere and best practice underpinning any intervention in the economy we have identified the following priorities for South Yorkshire.

- **Strong Leadership** is required to make things happen and bring convening power, advocacy and delivery. The proposal to appoint an Arts and Culture Lead for Sheffield city Region (SCR) is welcome but they will need enough administrative resources to be effective and to work very closely with local authorities and key institutions.

- A strategy imposed from above will not work so **involvement and ownership by the sector** is vital. Cultural Forums can facilitate this but need to be small enough to be effective but big enough to ensure representation from different sub-sectors, geographies and institutions.

- The lack of a **Culture Arts and Heritage Strategy** at SCR level was noted by some national funders who commented on 'uncoordinated and overlapping bids'. A strategy should encompass the "long term vision" alongside the more practical and hard-edged priorities and short-term action plans. It needs to inspire while also giving confidence to funding bodies.

- A proper South Yorkshire CAH vision and brand depends on **building a narrative of place** which articulates clear stories to engage people – whether visitors or residents. No clear narrative has been developed to date.

- Given resource constraints **prioritisation** is key – so mechanisms to assess interventions / investments that are tailored to the special circumstances of the CAH sector are required.

- It is important to support the sector with **capacity and resources** which may mean investing in administrative and support functions alongside the more high-profile grants, capital projects and programmes. In particular this means funding for:
  - the strategies, advisory boards, decision making processes etc noted above;
  - support for **sector networking / partnership** working;
  - specialist **business support** to help with CAH specific issues (like fund raising and volunteers);
  - **joint marketing** - pooling resources to produce joint marketing material for the region.

The impact and implications of Covid-19

The impact of Covid-19 on CAH in South Yorkshire is severe, and businesses are cutting expenditure, looking for new income and tapping into sector and central government support programmes.

The £1.5bn funding for the arts announced in July 2020 is welcome but the detail on additionality and distribution will be important, especially given that ACE emergency funding to South Yorkshire thus far has been only 55% of the England average in per capita terms.

Given that CAH investment has such a wide range of social and economic benefits - and that Covid-19 has resulted in such significant economic and community disruption - there are strong arguments for CAH playing an important role in the immediate South Yorkshire Economic Recovery Programme. In particular the CAH sector:

- can be turned on quickly (in parts) without the need for capital investment or complex supply chains;
- is flexible, adaptable (and creative) and is able to adapt quickly to new circumstances;
- needs collective regional support to ensure that it can access its fair share of the Government’s £1.5bn support package;
- can support and make use of parks / gardens / open public space / town centres the importance of which was highlighted during the lockdown;
- brings people and communities together in order to celebrate key workers, community solidarity, memorialise the dead and to look to the future;
- offers ways to bring learning to children outside of the classroom and help make up for 6 months of disruption;
- has a big impact on mental wellbeing which has taken a battering during the lockdown;
- supports fast growing creative industries such as online educational materials;
- has a close link to and can help support sectors badly hit by the lockdown (tourism and the night-time economy).

Elsecar Heritage Railway, Barnsley
Photograph: WE Great Place

Key facts and figures about the CAH sector in South Yorkshire

£370m
Economic and social benefits

£1.2bn
Wellbeing benefits

6,500
Direct and indirect jobs

*All benefits are annual with the exception of Education which is calculated on a different basis

540
Business enterprises

50,000
Volunteers

£10m
National funding gap per annum

Every £1 of GVA directly generated supports a further £2.70 in wider economic and social benefits:

Direct Impact		Indirect and induced		Other economic and social benefits
£1	+	£1	+	£1.70

Chapter 1 – Overview of the CAH sector

Portrait

South Yorkshire is a region of diverse landscapes. From the edge of the Pennine Moors in the West to the lowland wetlands in the East its geography has shaped local culture and economy for centuries. And the key to that geography is in the rocks and the water – the rocks which give form to varied landscapes, environments and materials and the water that shaped the land, dictated agricultural potential, determined transport links and accessibility and which ultimately provided the power for the first industrial revolution.

Elsecar, Barnsley. Man Engine Resurrection Tour commissioned by the Cornwall Mining World Heritage Site.
Photographer: James Mulkeen

In many ways the culture, art and heritage of South Yorkshire seems to reflect the landscape of the region – diverse, jagged edges and rolling, hidden, valleys and unexpected nooks. It is far from uniform.

Some selected jewels are highlighted below.

Table 1. A selection of CAH sector highlights

Landscape	Pennine Moors & Edges Bradfield Dale Don Gorge Humberhead Levels
Heritage Sites	Conisborough Castle, Doncaster Roche Abbey, Rotherham Wentworth Castle Gardens, Barnsley
Industrial Heritage	Abbeydale Industrial Hamlet, Sheffield Elsecar, Barnsley Waterloo Kiln, Catcliffe Glass Cone Rotherham Magna Science Adventure Centre Rotherham
Historic Houses, Parks & Gardens	Wentworth Woodhouse, Rotherham Brodsworth Hall and Gardens, Doncaster
Museums	Graves Museum & Art Gallery, Sheffield Barnsley Museums
Theatre	Crucible, Sheffield Lyceum, Sheffield Studio, Sheffield Civic Theatre, Rotherham The Civic, Barnsley Cast, Doncaster
Music	Sheffield City Hall Leadmill, Sheffield
Creative Education	Grimm and Co, Rotherham

Direct economic impact

Gross Value Added

The CAH sector generates around **£100m** each year – equivalent to 0.4 per cent of South Yorkshire's total economic output (GVA).

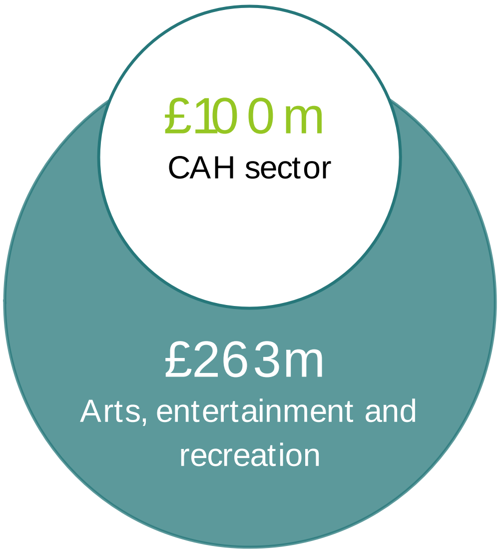
Around half of the value of economic activity is in Sheffield.

This estimate is based on a relatively tight definition of the sector and does not include many activities often associated with it, such as sport and leisure.

For comparison, on a broader measure of the sector, which also includes sport and leisure, but also gambling, GVA is £263m.

Crucible Theatre

The Needle's Eye, Wentworth, Rotherham. Photograph: WE Great Place



What have we included in the CAH sector?

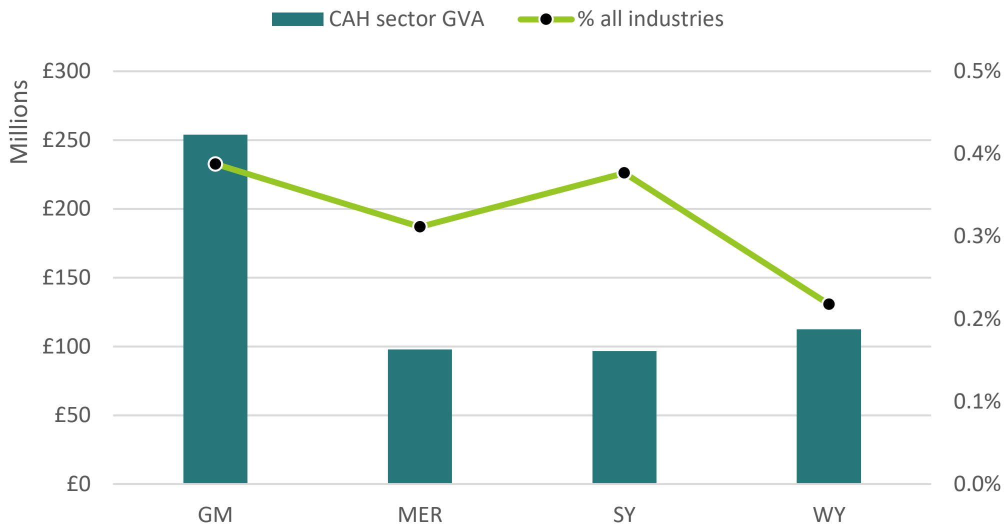
Broad sub-sector	Detailed sub-sector
Creative, arts and entertainment activities	• Performing arts • Support activities to performing arts • Artistic creation • Operation of arts facilities
Libraries, archives, museums and other cultural activities	• Library and archive activities • Museum activities • Operation of historical sites and buildings and similar visitor attractions • Botanical and zoological gardens and nature reserve activities
Other	• Manufacture of jewellery and related articles • Manufacture of musical instruments • Book publishing • Sound recording and music publishing activities • Photographic activities • Cultural education

South Yorkshire compares well to other northern city-regions on sector size

In absolute terms South Yorkshire's GVA is similar to Merseyside and West Yorkshire (c.£100m) but smaller than Greater Manchester (c.250m).

However, relative to the size of its economy, South Yorkshire's GVA is on a par with Greater Manchester (c. 0.4 per cent) and bigger than both Merseyside and West Yorkshire.

Chart 1. CAH sector GVA estimates, average 2015-2017, by combined authority



Source: CWE based on ONS regional GVA and other sources

There are differences in sector composition

In Greater Manchester creative, arts and entertainment activities is the largest component by far (70 per cent), whilst libraries, archives, museums and other cultural activities is the largest for both South Yorkshire (41 per cent) West Yorkshire (46 per cent).

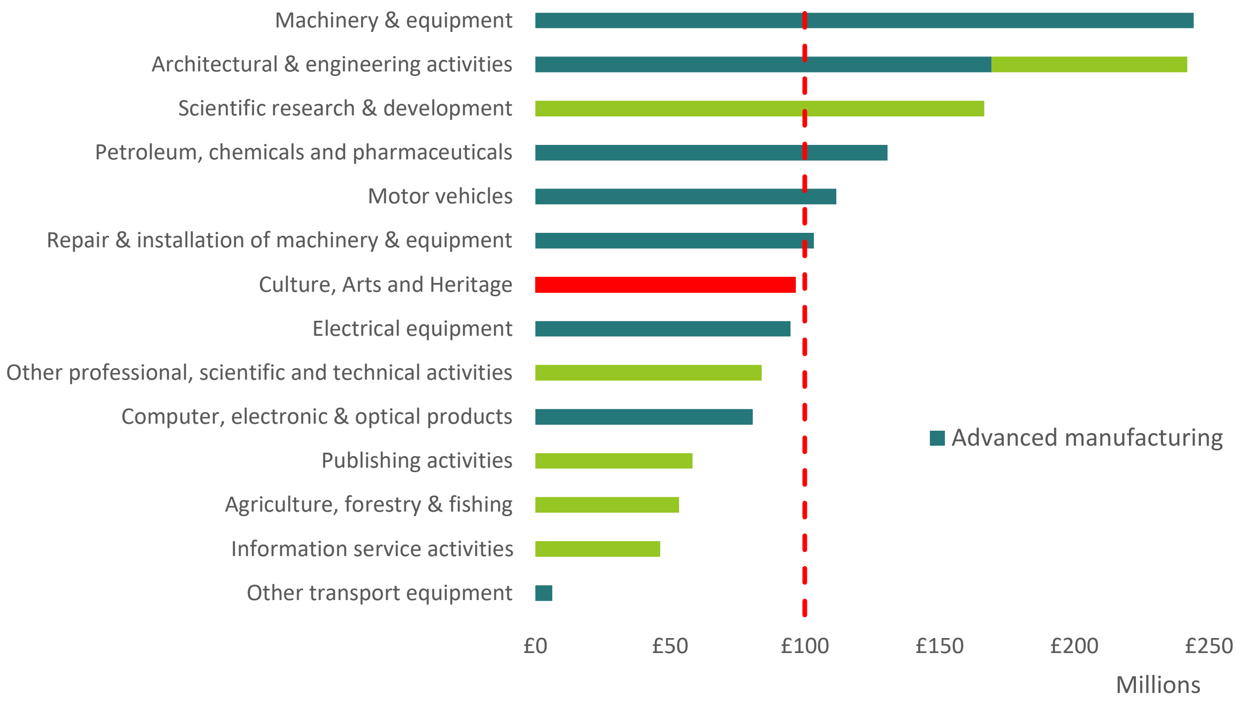
Table 2. CAH sector GVA estimates, broad sub-sector percentage shares, average 2015-2017, combined authorities

Broad sub-sector	**Share of total CAH sector GVA (%)**			
	GM	**MER**	**SY**	**WY**
Creative, arts and entertainment activities	71%	41%	27%	22%
Libraries, archives, museums and other cultural activities	10%	24%	41%	46%
Other	19%	35%	32%	32%

Source: CWE based on ONS regional GVA and other sources

South Yorkshire's £100m CAH sector is of comparable size to a number of other sectors of the local economy including parts of "advanced manufacturing"

Chart 2. CAH and other sector GVA estimates, average 2015-2017, South Yorkshire



Source: CWE based on [ONS regional GVA](#) and other sources

Other sectors in the chart include those which may be considered high value added and/or strategically important as growth drivers. As well as being a significant sector in its own right we will show that CAH has an important role in helping the wider economy to thrive.

Nuclear Advanced Manufacturing Research Centre

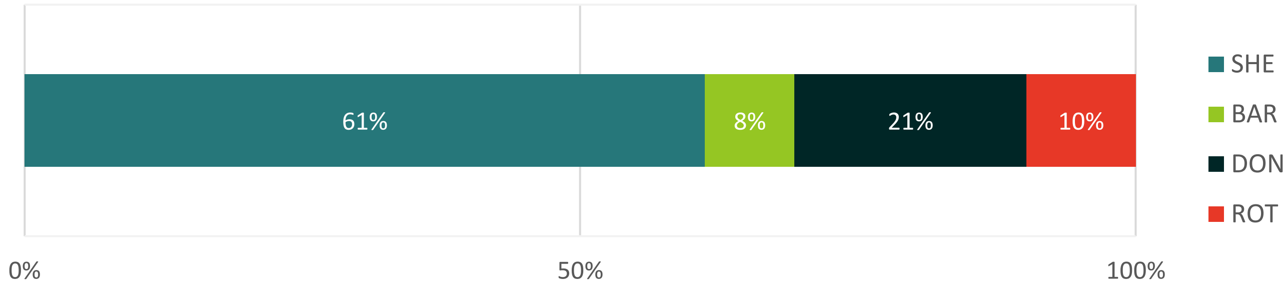
Jobs

The CAH sector employs around **3,000** people (direct jobs) – equivalent to 0.5 per cent of total employment in South Yorkshire.

More than half (60 per cent) of these jobs are in Sheffield.

Magna, Rotherham

Chart 3. CAH sector jobs, overall distribution across local authorities, 2015-2017, South Yorkshire



Source: CWE based on BRES

Jobs data

Employment figures are available from Business Register and Employment Survey (BRES). The BRES contains employee and employment estimates at detailed geographical and industrial levels and is the official source of employee and employment estimates by detailed geography and industry.[4] The survey includes both public and private sectors but does not cover the very small businesses that are not registered for Value Added Tax (VAT) or Pay As You Earn (PAYE), which make up a small part of the economy.

Spatial differences in jobs intensity can be explained by several factors, such as differences in:

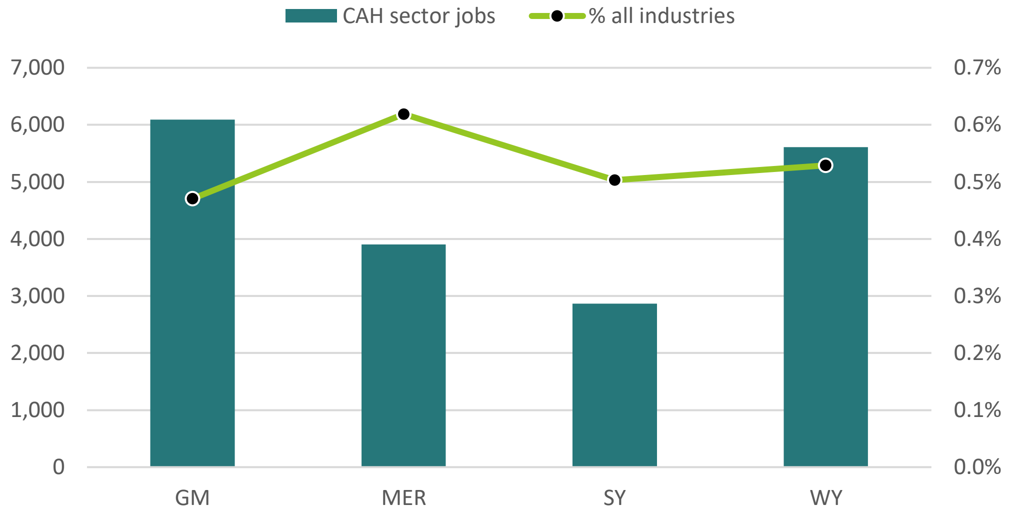
- composition of sub-sectors/activities;
- balance of full- and part-time jobs;
- jobs intensity and productivity;
- the extent with which employment is captured by the BRES (the survey does not include volunteers, or employment in businesses no registered for VAT and/or PAYE).

[4] An employee is defined as anyone aged 16 or over who are paid in return for carrying out a full-time or part-time job or being on a training scheme. Employment includes employees plus working owners who receive drawings or a share of the profits. Full-time is defined as working more than 30 hours per week with part-time defined as working 30 hours or less per week.

South Yorkshire has fewer jobs relative to its output than other city regions

South Yorkshire has the smallest number of CAH sector jobs relative to comparator city-regions – notably fewer than Merseyside and West Yorkshire despite similar levels of output. Possible explanations for this are noted above (Jobs data).

Chart 4. CAH sector jobs, average 2015-2017, by combined authority



Source: CWE based on ONS regional GVA and other sources

There are differences in the composition of jobs in the CAH sector

In South (and West) Yorkshire libraries, archives, museums and other cultural activities account for half of total CAH sector jobs, while in Greater Manchester creative, arts and entertainment activities accounts for the majority of jobs (59%).

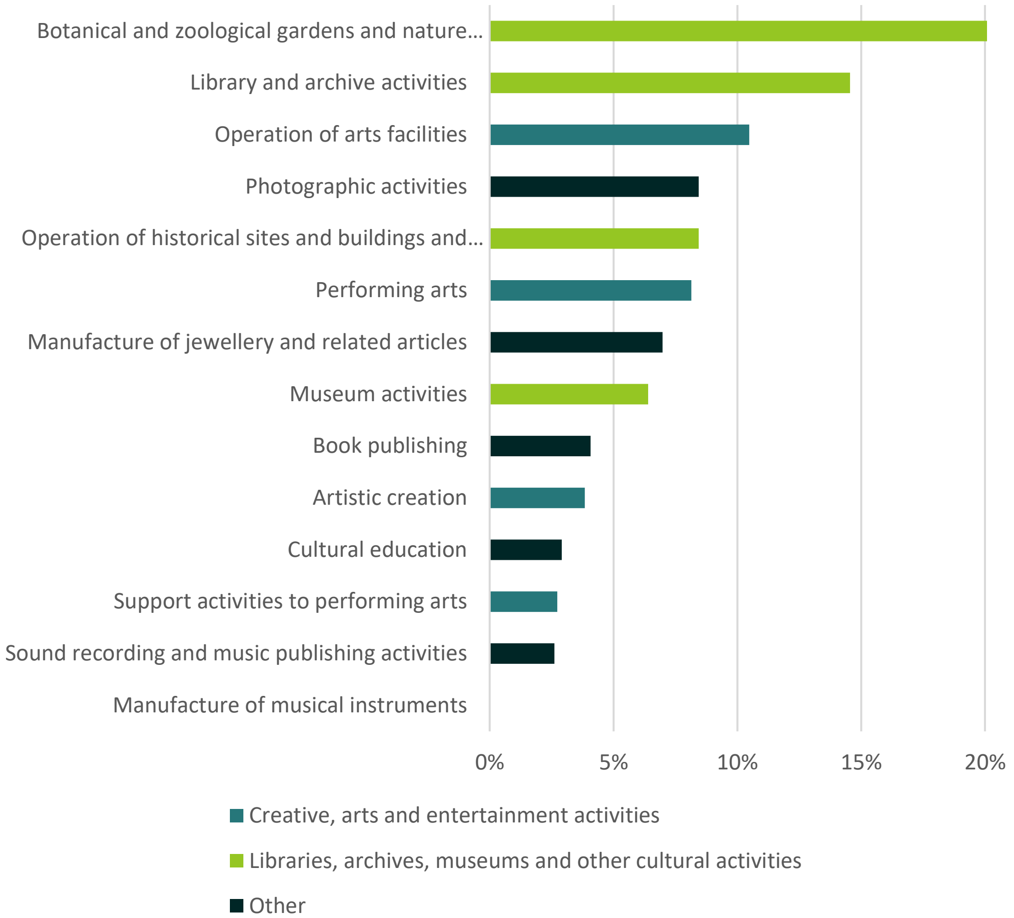
Table 3. CAH sector GVA estimates, broad sub-sector percentage shares, average 2015-2017, combined authorities

Broad sub-sector	**Share of total CAH sector jobs (%)**			
	GM	**MER**	**SY**	**WY**
Creative, arts and entertainment activities	59%	43%	25%	34%
Libraries, archives, museums and other cultural activities	23%	37%	50%	50%
Other	18%	20%	25%	16%

Source: CWE based on ONS regional GVA and other sources

South Yorkshire has large numbers of jobs in botanical and zoological gardens and nature reserve activities, and library and archive activities

Chart 5. CAH sector jobs, detailed sub-sectors, average 2015-2017, South Yorkshire

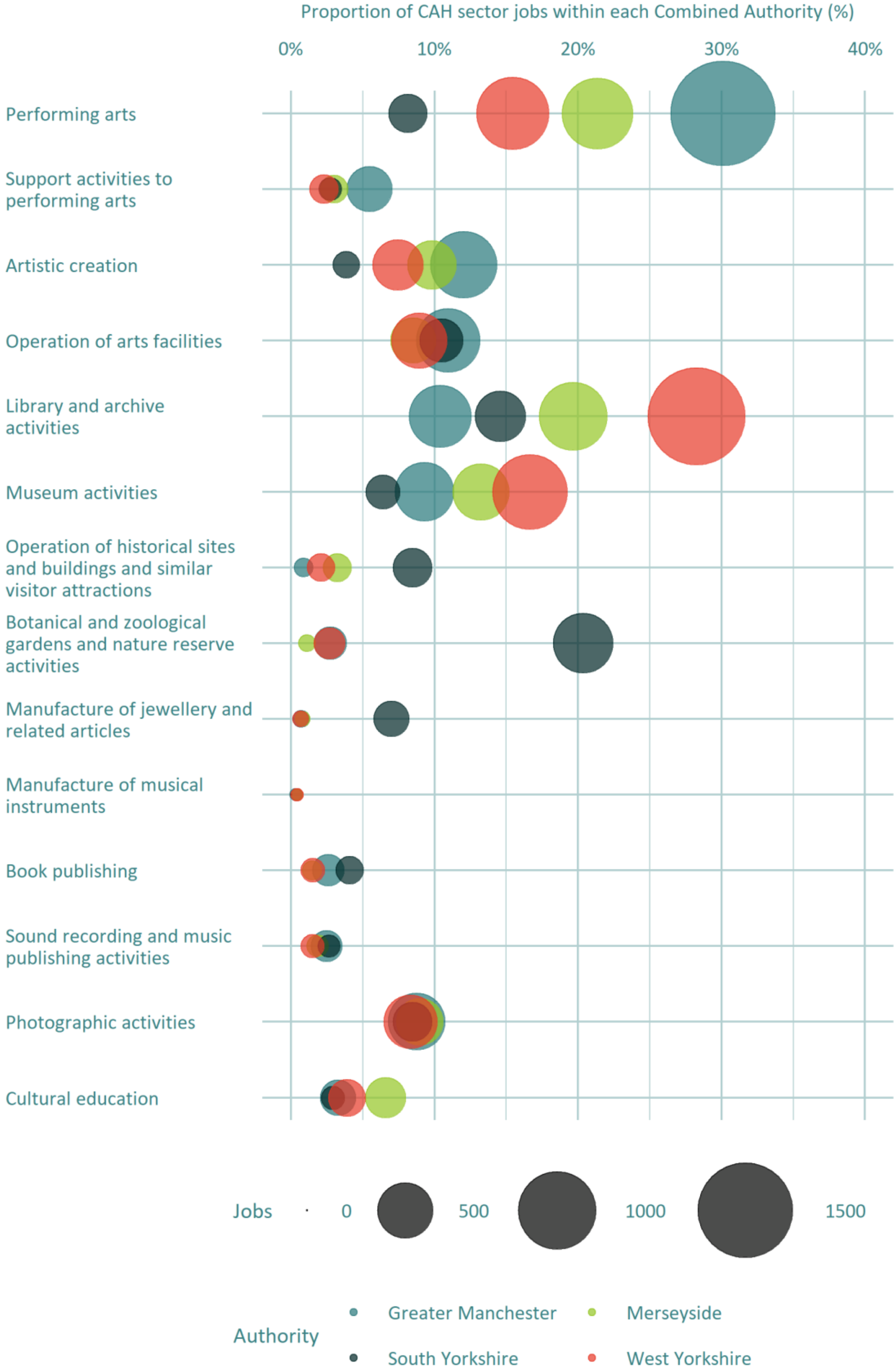


Source: CWE based on BRES

Music in the Round, Bridge Scheme. Sheffield Photographer: Fraser Wilson

South Yorkshire has fewer jobs than other City regions in key areas like performing arts, library and archives, museums and artistic creation

Chart 6. CAH sector jobs, detailed sub-sectors, average 2015-2017, Combined Authorities



Source: CWE based on BRES

Number and size of businesses

There are 540 CAH enterprises (overall businesses) and 620 business units (individual sites or workplaces) in South Yorkshire.

Most CAH-sector enterprises in South Yorkshire are classified as micro (95 per cent), which means fewer than 10 employees; and around 50 per cent of businesses have a turnover of less than £100,000. This is all consistent with the other northern city-regions and England.

About 25 per cent of South Yorkshire's CAH enterprises are located in Sheffield, Beyond Sheffield businesses are generally smaller in terms of both turnover and employment.

Rotherham Show. Photographer: James Mulkeen

Artists, Responsible Fishing at Rotherham Show. Photographer: James Mulkeen

The CAH sector is dominated by small organisations

Survey sample:

43% Zero paid employees	42% 1-10 employees
60% Turnover <£50K	70% Turnover <£100K

Source: CWE survey of CAH organisations in South Yorkshire

Business data

The Inter Departmental Business Register (IDBR) provides information on the population of UK businesses, by legal status (e.g. private company, non-profit, etc), employment and turnover size bands. The IDBR includes businesses registered for VAT and/or PAYE.

Data from the IBDR is not directly comparable to the survey carried out for this study. The IBDR survey sample for South Yorkshire only includes private businesses. Public and voluntary organisations, both crucial to the sector, are not represented.

If we remove voluntary organisations from our survey sample, 28 per cent have turnover of less than £50,000, close to the 26 per cent in the IBDR survey.

Sector assets

Landscape and water assets

The diversity of the region's landscapes is of itself a major asset; It owes this diversity to the underlying geology which in turn structures the region and has played an important role in shaping economic development; not least the distribution of coal deposits - near surface around Sheffield and Barnsley with deeper concealed coalfields in the east around Doncaster.

In the west are the Dark Peak moors with a distinctive character of windswept bog, tussock grass and gritstone walls. The major rivers of the region have their origins here shaping the Don, Rivelin, Loxley, Sheaf and Poulter valleys. In the centre of Sheffield these steep sided valleys join as the Don Valley.

Moving downstream the landscape becomes gentler, and more industrial. As the Don goes east it transitions onto the low-lying and almost flat landscape of the Doncaster, Goole and Humberhead levels. Draining this land was attempted many times from the 1400's onward but it was Dutch engineers in the 1600's who diverted the rivers, created drainage canals and left a landscape of canalised rivers, flood banks and windmills. The land remains flat, flood-prone and on its edges a trifle woolly and remote.

Pennine Moorlands & Western Valleys (Sheffield and Barnsley) - The wild feeling open moorlands which form the eastern flank of the Pennine Hills and the attractive deeply incised valleys such as Bradfield Dale. The majority of the western moorlands lie within the Peak District National Park (at around 17,000 square kilometres, South Yorkshire has far more National Park land than the other comparator authorities combined).

The Don Gorge and Magnesian Limestone (Rotherham and Doncaster) - The steep sided gorge carrying the River Don through the north-south Magnesian Limestone ridge is a spectacular and somewhat unexpected feature of the middle Don.

The Humberhead Levels (Doncaster) - Thorne, Goole, Crowle and Hatfield Moors - Comprising former marsh, fen and open water – these extensive flatlands are the heritage of drainage projects over centuries. They also now host resurgent wetlands vital to wildfowl and other wildlife – with RSPB and National Nature reserves.

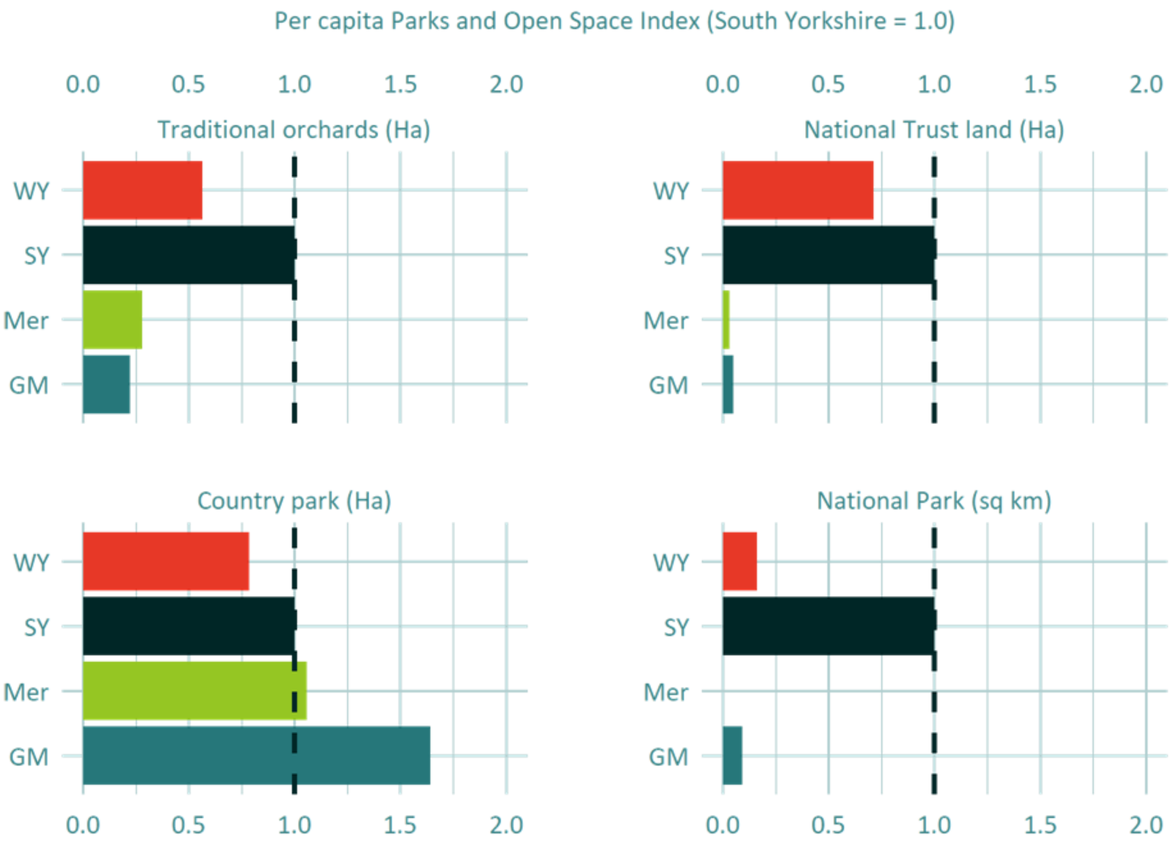
Peak District National Park

Parks and open space

South Yorkshire has around 17,000 square kilometres of National Park land within its boundary. This is far more than Greater Manchester, Merseyside and West Yorkshire combined.

South Yorkshire also has more traditional orchards and National Trust land[5] per person than the other northern city-regions.

Chart 7. Parks and open space per capita, indexed (1=South Yorkshire), combined authorities



Source: CWE based on Historic England and RSA Heritage Index 2016

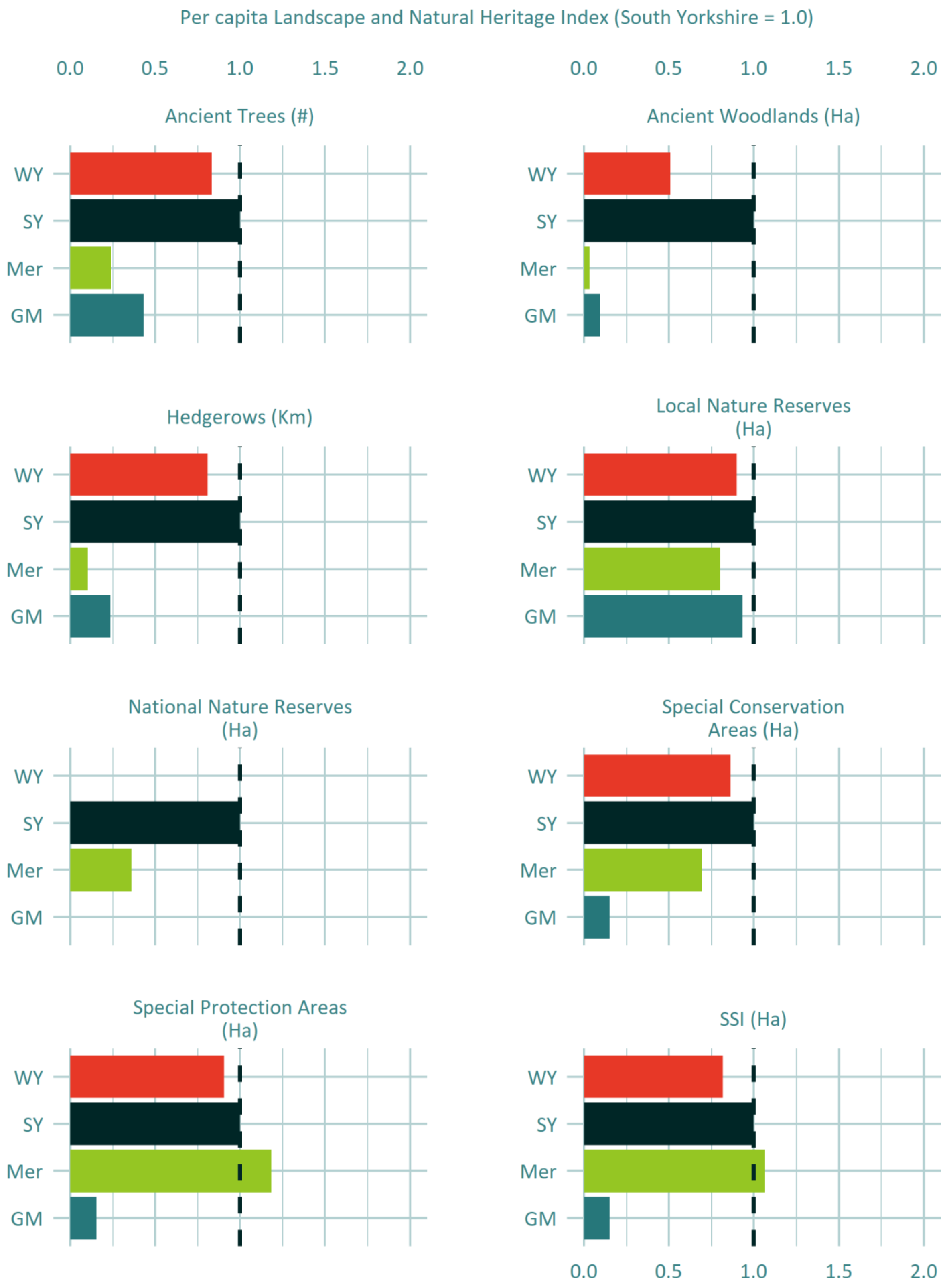
Bishops' House, Sheffield

Cannon Hall, Barnsley

[5] National Trust land here is that which is 'always open to the public'.

Landscape and Natural Heritage

Chart 8. Landscape and Natural Heritage per capita, indexed (1=South Yorkshire), combined authorities[6]



Source: CWE based on [Historic England](#) and [RSA Heritage Index 2016](#)

[6] SSI = Sites of Special Scientific Interest

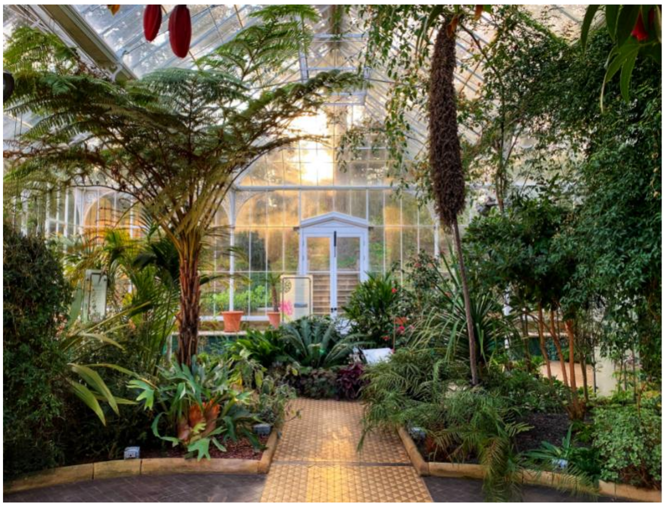
Heritage and heritage assets

The history and heritage of the region is diverse with Roman settlement and significant Medieval economic growth. It is industrial heritage (and the associated wealth creation) however that brings many jewels such as Wentworth Woodhouse. The dissolution of the monasteries placed large tracts of land into the hands of a new class of landed gentry keen to maximise financial returns, leading to iron and coal extraction and smelting – alongside grand houses. Mills and forges multiplied with new dams ensuring that every drop of water is used before it is allowed to escape.

Wentworth Woodhouse, Rotherham. Land art by the Landmark Collective. Photographer: Timm Cleasby

The valleys of South Yorkshire took on an industrial character and in the space of two generations Georgian Sheffield grew from a town of a couple of thousand people to a city of over 40,000.

This growth was aided by the early canalisation of the river Don and the construction of the Dearne and Dove Canal with its branches to Elsecar and Worsborough and the Barnsley Canal which together opened up a north-south route linking South and West Yorkshire.


Wentworth Castle Gardens, Barnsley

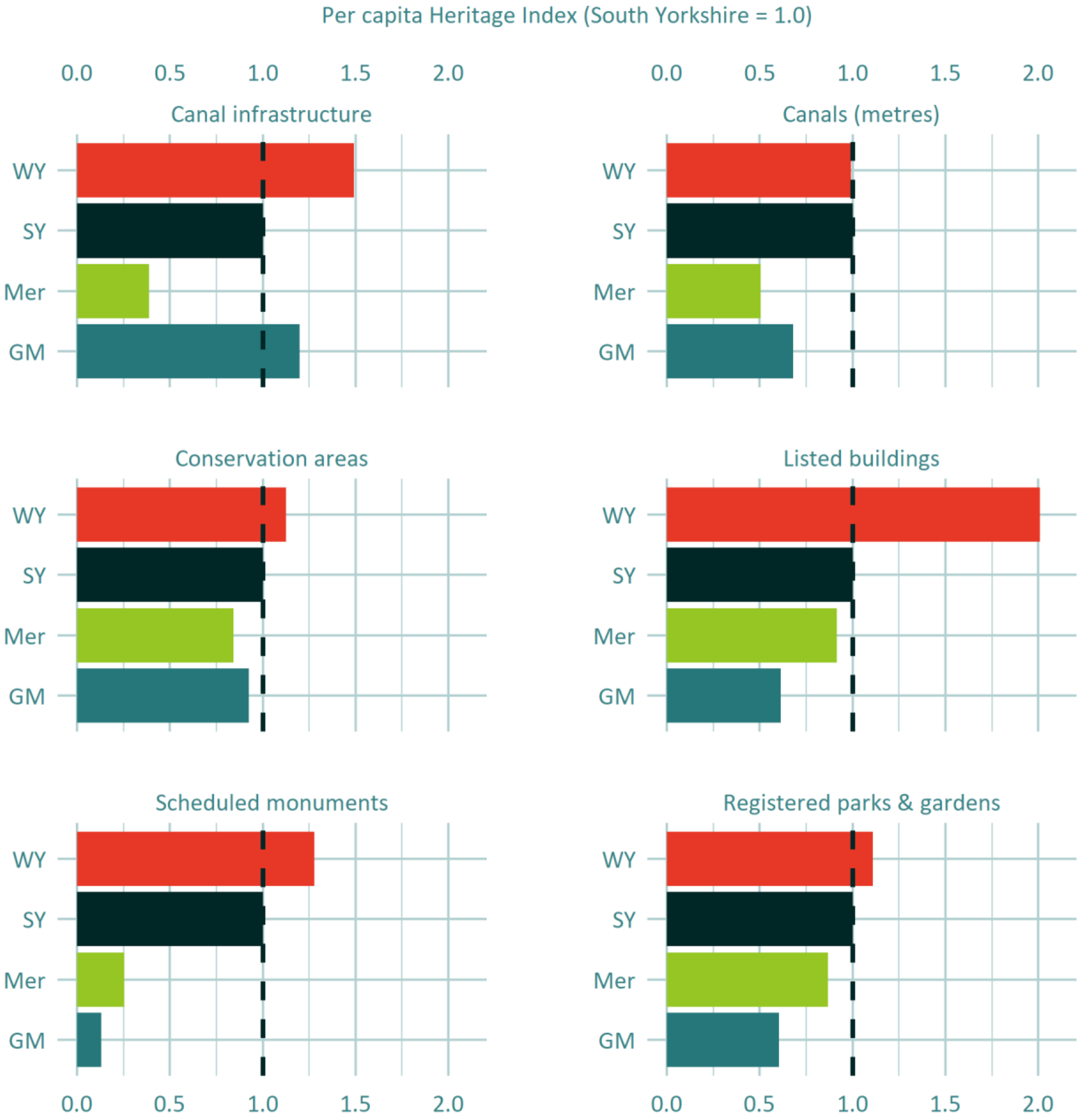
By the start of the Victorian era a significant part of the basic industrial framework was already in place and much of the subsequent development was the continued development of earlier trends. The railway era began with the opening of the Sheffield and Rotherham Railway in 1838 and by the end of 19^{th} century the region was crisscrossed by hundreds of miles of railway. The final major era of industrial expansion created new mining communities around Doncaster. This coalfield was not substantially tapped until the 20^{th} century and were the last to close, bringing the era of deep mined coal in the UK to an end in 2015.

The era of rapid industrialisation and growth created new communities with new traditions and activities. Some are tangible heritage – the origins of the first football association and rules together with the oldest football club in the world. Some intangible heritage - with rich traditions of brass (or tin) bands and folk music performance which continue to the present.

South Yorkshire has a wealth of heritage assets

South Yorkshire's heritage assets include canals[7], conservation areas, listed buildings and registered parks and gardens. The chart below compares South Yorkshire heritage assets with three other combined authorities on a per capita basis. The figures are indexed, with South Yorkshire set to 1.

Chart 9. Heritage assets per capita, indexed (1=South Yorkshire), combined authorities



Source: CWE based on Historic England and RSA Heritage Index 2016

[7] Two metrics are considered: canal infrastructure (e.g. bridges and viaducts) and canal length

Sheffield	
Bishops’ House	Early 16th century half-timbered house with exhibitions.
Abbeydale Hamlet	Historic steel and iron-working site with living history enactors
Shepherd Wheel	Former grinding workshop with water wheel, grinding hulls and grinding wheels
Rotherham	
Wentworth Woodhouse	17th and 18th century country house - English Baroque / Palladian
Catcliffe Glass Cone	Part of 18th century glassworks, grade 1 listed
Rotherham Minster	14th century church restored in Victorian times in perpendicular style
Roche Abbey	Ruined 12th century abbey
Barnsley	
Cannon Hall Museum & Park	17th-century country house, includes fine collections and a Regimental Museum
Worsbrough Mill	Rural industrial complex with a 17th C water powered mill and a 19th C steam-powered mill
Elsecar Heritage Centre	Early industrial and mining village
Elsecar Steam Railway	Industrial Steam Railway. Linked to above but operate separately.
Wortley Top Forge	Historic former ironworks and water-powered forge
Wentworth Castle	Early 18th-century house under restoration, gardens
Doncaster	
Cusworth Hall	Restored 18th-century country house with local history exhibits
Brodsworth Hall	Victorian country house, features late 19th to late 20th century interiors, 1860s gardens.
Conisbrough Castle	Historic house, restored medieval castle keep and medieval life exhibits
Sheffield and Tinsley Canal	Effectively abandoned in the early 1970s but re-vitalised since the 1990s and now fully open.
Stainforth and Keadby Canal	Open
New Junction Canal	Open
Barnsley, Dearne and Dove Canal	Closed 1961. (the recent restoration campaign has used the Barnsley Dearne & Dove Canals title)

Art and culture assets

Arts and Culture is here divided between those activities focused on presenting the past and those activities focused on the creation of new art and culture. Within South Yorkshire the focus has been very much upon the curation of the past. Across the heritage sector nationally we are now seeing a major change – the arts being perceived as a stimulus to innovation and re-imagining museums and galleries as creative centres. An example is the transformation of the Silk Mill in Derby into the “Museum of Making” with stronger links to both industry and the local maker-community and a mission to both stimulate and enable creativity. In the South Yorkshire this approach is also apparent in the National Video Games Museum’s strategy to grow the next generation of game builders.

Museums and Art Galleries (led by historical content)

These include the major traditional museum sites and art galleries featuring historic art works. Many museums in South Yorkshire have undergone radical reinvention in recent years and this process is ongoing. In consequence the gap between an engaged museum and a heritage site is now vanishingly small and many sites here could also be placed in the heritage category.

Sheffield	
Graves Museum and Mappin Art Gallery	Visiting exhibitions with galleries of natural history, archaeology, decorative arts, social history
Graves Art Gallery	Art Collections of 19th- and 20th-century British and European art
Kelham Island Museum	Local industries including steelmaking, steam engines, Sheffield-made road vehicles
National Emergency Services Museum	Unique collection of largely 20th century fire, police and ambulance equipment, uniforms and vehicles
Cutlers Hall	Displays of silverware and cutlery, interior decoration (open by appointment only)
Alfred Denny Museum	Natural history collections. Open each month for guided tours only
Turner Glass Museum	C19 and C20glass, production methods and examples (open by appointment only)

National Videogame Museum	A unique museum where you can play, explore and create videogames
Rotherham	
Clifton Park, Museum	Temporary exhibition spaces, York & Lancaster Regimental Collection & Archive, Rotherham Archives, Victorian Kitchen, local social history, ceramics, fine art
Magna	Spectacular hands-on exhibits about earth, air, fire, water, power, steelmaking
South Yorkshire Transport Museum	History of bus transport in South Yorkshire illustrated by large bus collection
Barnsley	
Cannon Hall	Local history, ceramics collections and home to the De Morgan Gallery
Experience Barnsley	Local social history and archaeology, archives centre and changing exhibitions
Maurice Dobson Museum	Local History
Yorkshire Sculpture Park	Art Open-air gallery but on the border of South and West Yorkshire
Doncaster	
Doncaster Museum & Art Gallery	Natural history, archaeology, local history, fine and decorative art, pottery in Yorkshire
Kings Own Yorkshire Light Infantry Museum	Doncaster Military History and memorabilia of the Kings Own Yorkshire Light Infantry
South Yorkshire Aircraft Museum	Displays of restored and historic airplanes on the site of the former RAF Doncaster

Theatres, Performance Space and Contemporary Art Galleries

The performance and contemporary arts scene is dominated by a relatively small number of key theatres and galleries. Theatre development in particular has been driven by external funding based upon external perceptions of artistic merit and success. The result is a clear cluster in Sheffield where a "theatre quarter" has been created around the Crucible and Lyceum Theatres. This in turn supports contemporary galleries and reinforces the notion of a clustering approach. It is notable that Sheffield also has many pop-up and grass roots / community theatres.

This pattern is similar to that seen in other English Regions where clusters emerge from a reinforcement of initial success and ancillary activity follows. Across South Yorkshire dedicated major performance spaces for music include Sheffield City Hall, the O2 Academy Sheffield, the Leadmill, the Metrodome in Barnsley and the Doncaster Dome.

Grass roots music is seen in the widespread use of church and village halls for concerts and these together with public houses provide the bedrock of community music making. This type of activity may not register in terms of GVA but has considerable impact on community cohesion and individual wellbeing. The survival of these informal performance spaces – arguably a seedbed for new talent – was already under commercial pressure and was identified by contributors as a cause for concern. This pressure will doubtless be amplified in the post-Covid era.

Title	Interest
Sheffield	
Sheffield City Hall	Music performance, concerts, Halle Orchestra venue when in Sheffield
The Leadmill	Music Venue
O2 Academy Sheffield	Music Venue
Crucible Theatre	Contemporary theatre and performance. Many new productions which later tour
Studio	New work, experimental performance
Lyceum Theatre	19th-century theatre hosting touring West End musicals, comedy and locally produced shows.
Theatre Deli	Contemporary Performance Arts in a former trading estate building (pop up theatre)
Drama Studio	New productions, theatre and performance
Merlin Theatre	Local community theatre
Lantern Theatre	Local community theatre
Millennium Gallery	Exhibits of historic and contemporary art and crafts
S1 Artspace	Artist-led organisation with programmes of contemporary exhibitions
Sheffield Institute of Arts	Changing exhibits of art and design (part of Sheffield Hallam University)
Site Gallery	Changing exhibits of multimedia-based art
Yorkshire ArtSpace	Contemporary art exhibits

Rotherham	
ROAR	Rotherham Open Arts Renaissance – artist-led studios, events and exhibitions
Grimm and Co	creative writing charity and 'Apothecary to the Magical'
Rotherham Civic Theatre	Contemporary theatre, touring productions, visiting artists
Barnsley	
Lamproom Theatre	Contemporary theatre, touring productions, visiting artists
Metrodome	Music Venue
Academy Theatre	Theatre, and performance – visiting artists
Cooper Gallery	Contemporary art, collection of 17th- to 20th-century paintings, watercolours and drawings
The Civic	Performing arts centre with art gallery
Yorkshire Sculpture Park	Art Open-air gallery but on the border of South and West Yorkshire
Doncaster	
Cast	Theatre and Performance Space
Doncaster Dome	Music Venue
The Little Theatre	Community Theatre & venue
Bawtry Phoenix Theatre	Community Theatre & venue

Festivals and Events

Many of the above institutions are also hosts to a wealth of festivals of the arts, music, literature, heritage and history. Examples include Tramlines, Rotherham Show, WE Wonder, Barnsley Bright Nights, Off the Shelf and Wentworth Music Festival. The relationship ranges from in-house creation to simply providing a venue. Many are sponsored by the local authority – and can culminate in longer term goals - for example Rotherham's ambitious plans to become the Children's Capital of Culture in 2025 – a year-long celebration building on previous Children's Festivals.

In all cases, and whatever their scale, these festivals provide vital publicity and income for the organisations concerned. Their cancelation or delay due to Covid 19 is having a major impact on their financial positions even where – like Music in the Round (Sheffield) – they have been able to produce on-line versions of their festival programme. The future of these festivals is one of the key challenges for post Covid planning.

Music Organisations

The region also hosts a number of organisations dedicated to the promotion of music and the support and development of artists working in those genres. Several of these have grown out of historic federations, others out of key festivals. In all cases they contribute to increasing the diversity of music in the region and serve to support both professional and community music making and performance. The following are bodies that receive Arts Council England funding in addition to the four Local Authority Music Education Hubs. It is not a complete list of organisations many of which are transitory and overlap with the festival organisers noted above. The key is that diversity provides the opportunity for new growth.

Title	Interest
Sheffield	
Music in the Round	Chamber Music Festival (this year online)
Rotherham	
Khula Arts	BAME-led music production and performance
Barnsley	
Brass Bands England	Support for brass band music making across England with a strong local presence (formerly the Federation of Brass Bands)
Doncaster	
Higher Rhythm Ltd	Not for profit company providing artist development, recording studios, a record label, digital distribution, a radio station, courses and event promotion
Jazz North	"Enriching lives through improvisation" – supports artist development and the promotion of venues and audience sympathetic to jazz and related styles.

Financial strength of the sector

We do not have access to detailed information about the financial strength of the sector – which would in any case be very out-of-date after the Covid-19 pandemic. However, there is some information (albeit pre-Covid) from our survey and some important historical trends and comparisons that are worth highlighting.

Only 20 per cent of CAH institutions say they are very or extremely reliant on private donations and/or corporate sponsorship while 42 per cent are very or extremely reliant on public funding.

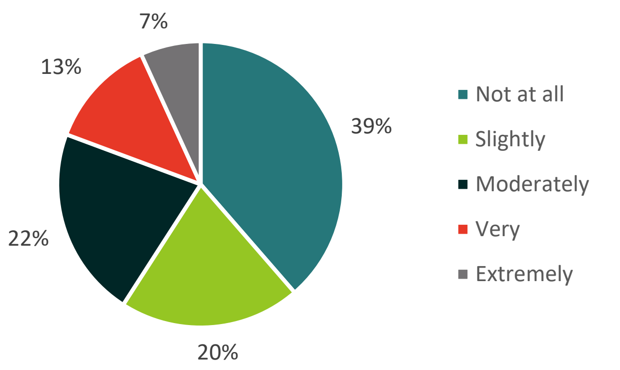
A 2016 report for Arts Council England noted that arts and culture organisations in Yorkshire and Humber attracted around £17m from private funders.[8] This suggests that private donations and/or corporate sponsorship could be worth around £2.6m to South Yorkshire. This is significant, though a fraction of the funding provided by public national funding bodies.

Public money is vital to the sector with 30 per cent saying they are extremely reliant. This is important given the decline in funding for the sector – and evidence suggesting South Yorkshire attracts less money from the main funding bodies compared to other areas.

The survey confirms that Arts Council England and National Lottery Heritage Fund are significant sources of national funding.

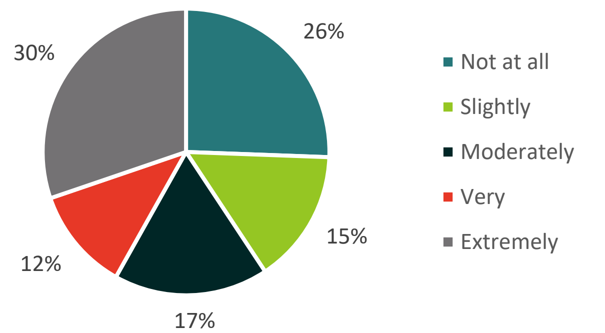
Graves Gallery, Sheffield

Chart 10. How reliant is your organisation on private donations and/or corporate sponsorship?



Source: CWE survey of CAH organisations in South Yorkshire

Chart 11. How reliant is your organisation on financial support from funding bodies?



Source: CWE survey of CAH organisations in South Yorkshire

Table 4. Please indicate whether your organisation receives funding e.g. grants from one or more of the following

Arts Council England	35%
National Lottery Heritage Fund	31%
Historic England	6%
Local authority	32%
Other national	31%
Other local	28%

Source: CWE survey of CAH organisations in South Yorkshire

[8] Arts Council England (2016), "The Private Investment in Culture Survey". MTM

National Lottery Heritage Fund (NLHF)

The NLHF is the largest dedicated funder of heritage in the UK and plans to invest £1.2bn in 2019-2024. South Yorkshire received awards totalling almost £25m between 2013/14 and 2018/19. On a per capita basis this is significantly less than national averages.

Chart 12. NLHF awards, 2013/14 to 2018/19, combined authorities,

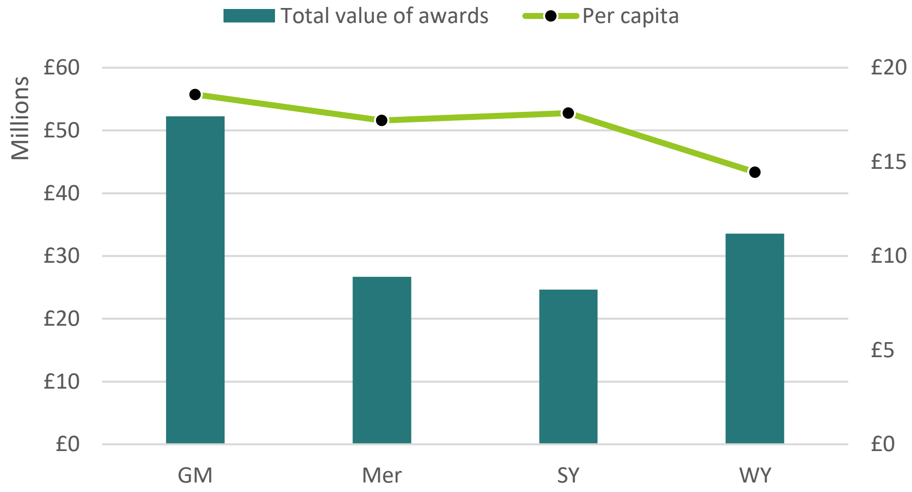


Table 5. per capita NLHF awards (2013/14 to 2018/19)

England	£31/person
The North	£30/person
Greater Manchester	£19/person
South Yorkshire	**£18/person**
Merseyside	£17/person
West Yorkshire	£14/person

Source: CWE based on National Lottery Heritage Fund

Just over half the funding awarded to South Yorkshire was for nature and landscapes.

Other major funding areas were historic buildings and monuments (21%) and community heritage (11%). South Yorkshire received less funding for historic buildings and monuments than Greater Manchester, Merseyside and West Yorkshire on per capita basis (£3.70/person compared to an average of £9.40/person). Funding for community heritage in South Yorkshire (£1.90/person) was similar to West Yorkshire (£1.80/person), and more than the two North West authorities (average of £0.50/person).

NLHF have identified nature and landscapes, and community heritage as priority areas over the next 5 years which bodes well for South Yorkshire given historic funding awards and its relative wealth of assets in these areas.

Within South Yorkshire, 50 per cent of NLHF awards went to Sheffield with the remainder distributed across Barnsley (27%), Doncaster (8%) and Rotherham (14%).

Arts Council England (ACE) – National Portfolio Organisations (NPOs)

ACE is investing £407m per year in 828 organisations in its National Portfolio over a four-year period. Total investment in South Yorkshire is less than other Combined Authorities and other areas – at just over £20m or £15/person.

Chart 13. NPO funding agreements, 2018/19 to 2021/22, combined authorities,

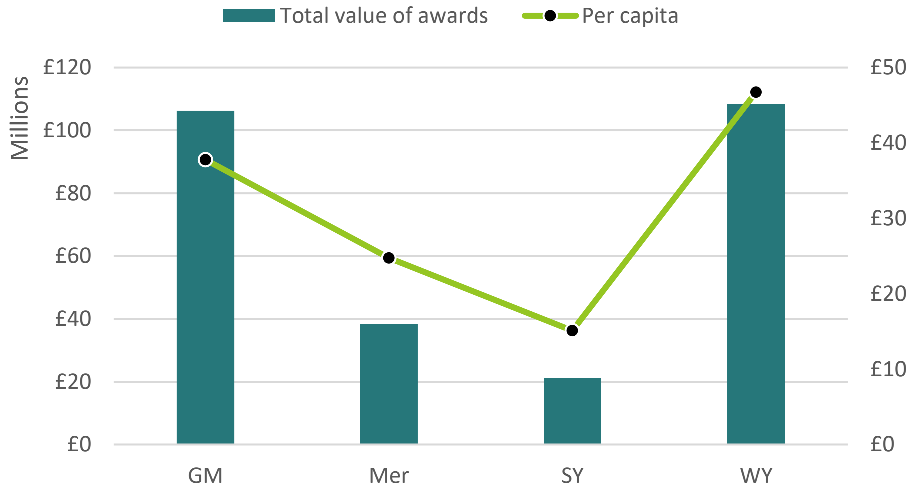


Table 6. per capita NPO funding agreements (2018/19 to 2021/22)

West Yorkshire	£47/person
Greater Manchester	£38/person
England	£29/person
The North	£27/person
Merseyside	£25/person
South Yorkshire	**£15/person**

Source: CWE based on Arts Council England | National Portfolio dataset

The highest proportion of funding in South Yorkshire is for theatre (36%) followed by museums (26%), combined arts (13%), music (11%), visual arts (11%), and literature (4%).

Sheffield receives the majority of investment in South Yorkshire (70%) reflecting the fact that all the funding for theatres, and most of the funding for museums, is Sheffield-based. Rotherham attracts the least funding.

Table 7. *National Portfolio Organisations in South Yorkshire and total portfolio grant 2018/19 to 2021/22*

	Organisation	Local Authority	£m
Visual arts	AA2A Limited	Sheffield	0.16
	Sheffield Doc/Fest	Sheffield	0.56
	Site Gallery	Sheffield	1.26
	Yorkshire Artspace Society Ltd	Sheffield	0.29
Theatre	Eclipse Theatre Company Ltd	Sheffield	1.00
	Forced Entertainment Ltd	Sheffield	1.00
	Sheffield Theatres Trust Ltd	Sheffield	5.12
	Third Angel	Sheffield	0.48
Music	Brass Bands England	Barnsley	0.83
	Higher Rhythm Ltd	Doncaster	0.22
	Jazz North	Doncaster	0.76
	Music in the Round	Sheffield	0.57
Museums	Barnsley Museums	Barnsley	1.87
	Doncaster Heritage Services	Doncaster	0.40
	Sheffield Galleries & Museums Trust	Sheffield	3.20
Literature	And Other Stories Publishing CIC	Sheffield	0.30
	Grimm & Co	Rotherham	0.46
Combined arts	Barnsley Civic Enterprise Ltd	Barnsley	0.64
	Cast	Doncaster	1.28
	darts (Doncaster Community Arts)	Doncaster	0.52
	Rotherham Open Arts Renaissance	Rotherham	0.28

Graves Gallery, Sheffield

Arts Council England (ACE) – National Lottery Project Grants

National Lottery Project Grants is an open access programme for arts, museums and libraries projects. From 2018/19 to 19/20 investment in South Yorkshire was higher than Merseyside but lower than England, the North, Greater Manchester and West Yorkshire.

Chart 14. NPO funding agreements, 2018/19 to 2021/22, combined authorities

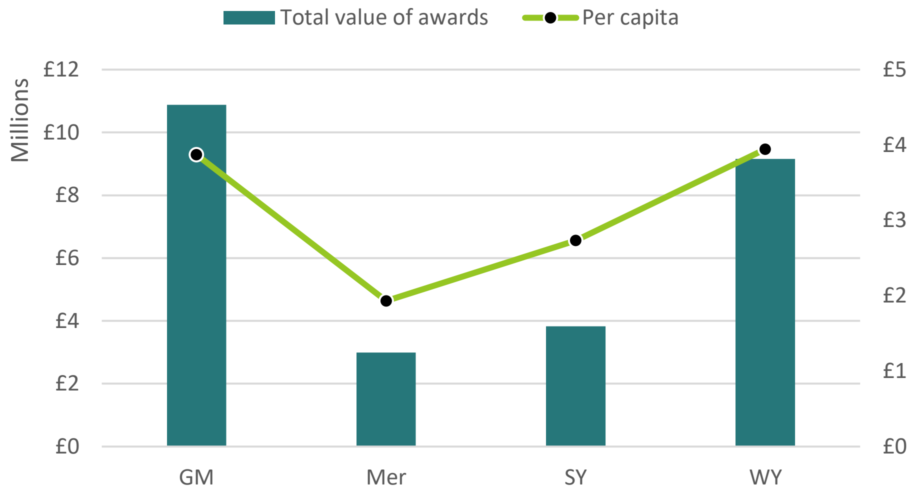


Table 8. per capita ACE National Lottery Grants (2018/19 to 2019/20)

West Yorkshire	£3.94/person
Greater Manchester	£3.87/person
England	£3.19/person
The North	£2.94/person
South Yorkshire	**£2.73/person**
Merseyside	£1.93/person

Source: CWE based on : CWE based on Arts Council England | Project Grants Data

The highest proportion of funding in South Yorkshire is for theatre (26%) followed by visual arts (21%), combined arts (18%), dance (14%), literature (11%), and music (7%).

From 2012/13 South Yorkshire received an average of £11.3m per year from ACE (including funding to NPOs, National Lottery Project Grants, and other) of which Sheffield received £5.8m (51%), Barnsley £2.9m (25%), Doncaster £2m (17%); and Rotherham £0.7m (6%)[9].

[9] Further information on Arts Council investment can be found on the Art's Council's interactive dashboard.

Local Authority funding

All Local Authority spending has declined significantly since 2008/9. Net expenditure per head on CAH in South Yorkshire fell by more than 40% and is significantly below other city regions at £28/person and well below the English average (£32/person).

Chart 15. Local authority net expenditure, 2018/19, combined authorities

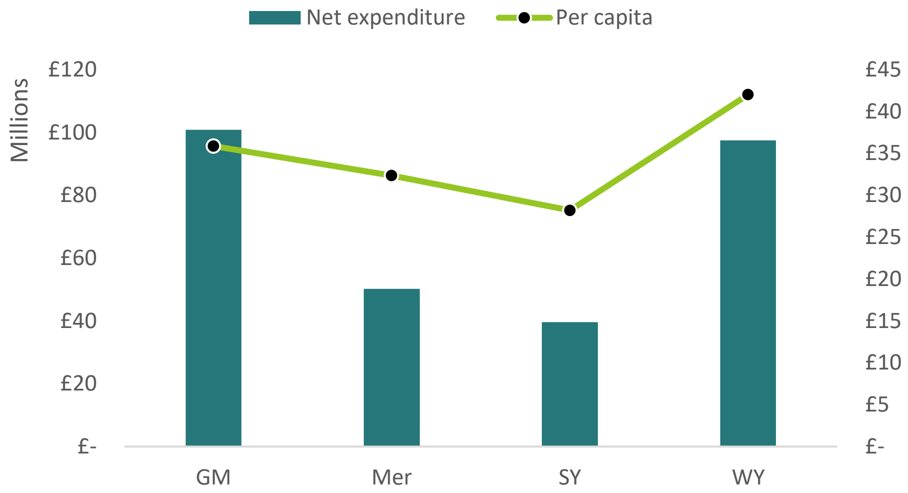


Table 9. per capita local authority net expenditure (2018/19)

West Yorkshire	£42/person
Greater Manchester	£36/person
England	£34/person
Merseyside	£32/person
South Yorkshire	**£28/person**

Source: CWE based on MCHLG | Local authority revenue expenditure and financing England

The biggest reductions since 2008/09 have been South Yorkshire (-41% from £48/person down to £28/person) and Merseyside (-47% from £61/person down to £32/person). The cuts are even more significant in real terms i.e. accounting for ten years' worth of inflation.

A more detailed breakdown of net expenditure per person can be found in annex B. Spending on arts and development support in South Yorkshire is a lot lower than the other areas, as is spending on heritage.

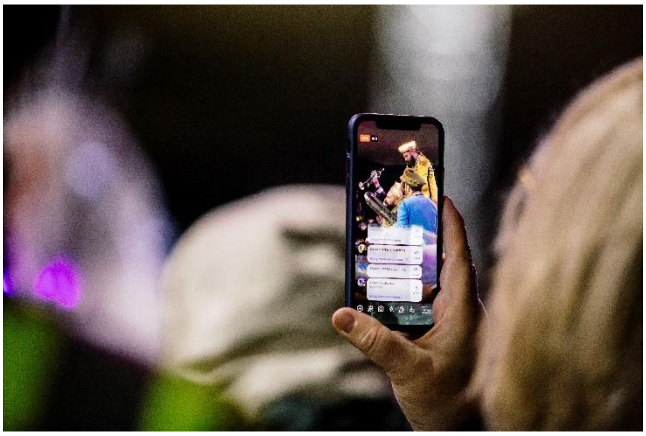
The Leadmill, Sheffield

Chapter 2 – Economic and social impact of the CAH sector

Overview

We have established that the CAH sector is a significant part of the regional economy with Gross Value Added of almost £100m per annum and directly employing around 3,000 people.

However, there are a range of wider economic and social benefits that need to be taken into account when assessing the benefits of investment in the sector.



WE Wonder Noir featuring Mr Wilson's Second Liners. Photographer: James Mulkeen

Supply chain and induced activity

In addition to the direct effect of the CAH sector there are also indirect economic impacts.

The "multiplier" calculates this impact:

- Type 1 multiplier: direct impact plus indirect supply chain impact (goods and services required by CAH businesses supplied by other businesses in the area)

- Type 2 multiplier: direct impact plus indirect supply chain impact and induced expenditure (spending by those employed directly and/or supply-chain businesses adds to demand for goods and services from suppliers in the area)

Drawing on evidence from other studies we have derived estimates of the multipliers relevant to the CAH sector in South Yorkshire. Whilst these estimates are subject to some uncertainty, they show the potential impact the CAH sector could have on economic activity more widely. The scale of impact could be increased if the sector can retain more spending locally.

These suggest that the following multipliers are realistic estimates.

Metric	Direct	Indirect	Induced	Multiplier	
				Type I	Type II
GVA	£ 1.00	£ 0.57	£ 0.46	1.57	2.03
Jobs	1	0.72	0.54	1.72	2.26

This means that for every:

- £1 of GVA directly generated, an additional £1.03 of GVA is supported in the wider economy. The additional GVA includes £0.57 indirect and £0.46 induced; and

- 1 direct job created; an additional 1.26 jobs are supported in the wider economy. The additional jobs include 0.72 indirect and 0.54 induced.

Using the direct GVA and employment figures from Chapter 1 this suggests that the overall impact of the sector is GVA of nearly £200m and employment of 6,500 people.

Wider benefits

There are many wider benefits from the CAH sector beyond quantified GVA and employment.

- GVA does not include the value of non-market activities (the informal economy). This might include amateur or part-time artists or musicians whose output is not captured. It is also not clear that GVA fully reflects the value of national subsidies (such as grants from the likes of Arts Council England). So, the formal economic data will under-represent the sector.

- Both market and non-market activities will produce "positive externalities" which benefits the local economy beyond the indirect supply chain and induced expenditure. This could include improving skills (especially linked to creative industries), enhancing productivity, boosting tourism and night-time/visitor economy and attracting inward investment through 'placemaking'.

- Many positive externalities might not benefit the formal economy but nevertheless improve the welfare of South Yorkshire's residents. This includes both individual wellbeing (health, learning, pleasure, fulfilment, meaning, identity etc) and community wellbeing (social capital, community cohesion, identity etc)

Our survey asked about the wider impact of South Yorkshire CAH institutions. 85% indicated direct involvement in one or more activity, with education and training and community support being the most common.

Elsecar, Barnsley. Puddler's Fair featuring Granny Turismo. Photographer: Graham Oxby

Elsecar-by-the-Sea, Barnsley. Featuring artists Gemma Nemer and Dan Ryder

Table 10. Please indicate whether your organisation provides or supports any of the following activities in South Yorkshire

Education and training	64%
Local business support	17%
Community support	52%
Place-making or regeneration	44%
Other	19%

Source: CWE survey of CAH organisations in South Yorkshire

Activities cited included schools' engagement, classes, attracting tourists, local community events and festivals, care for the public realm, supporting the local economy, encouraging participation and sense of civic pride and volunteering opportunities – bringing people together. In addition, many respondents highlighted that:

- events / activities are often free and open to all;
- many organisations emphasise engagement with diverse often excluded communities – learning difficulties; BAME; LGBQT+ etc;
- health, education and wellbeing outcomes, as well as inclusion and social cohesion are common themes.

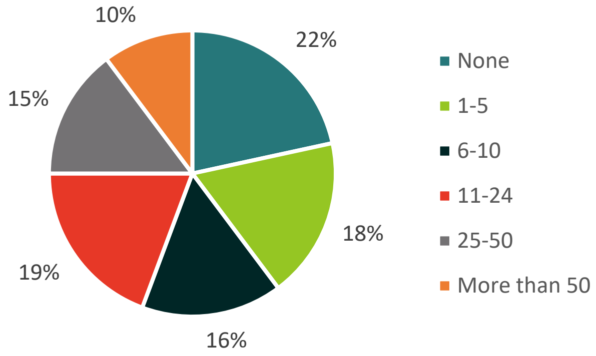
By their very nature many of these wider benefits are difficult to quantify. However, we will attempt to shine a spotlight on some of them.

Wider economic benefits

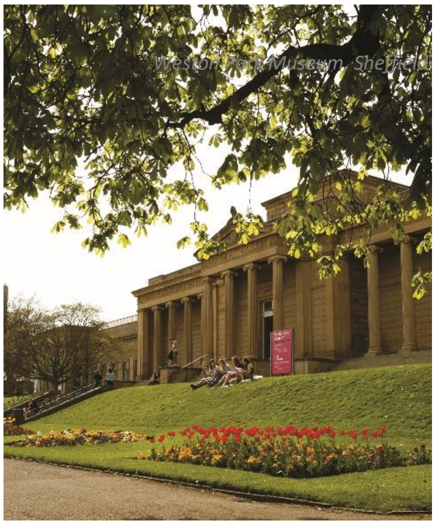
Volunteering

78% of organisations surveyed said they had volunteers working for them. We estimate that there could be 38,000 to 76,000 adults volunteering in the CAH sector in South Yorkshire (or 3 to 7 per cent of the adult population). Assuming it is 5 per cent of the adult population the number is around 50,000. This seems huge in the context of the 3,000 paid jobs in the sector, though volunteers contribute less time than paid workers. Converting both figures to full-time equivalent suggests the total time contribution of volunteers could be on a par with that of paid employees.

Chart 16. Number of volunteers employed in South Yorkshire.



Source: CWE survey of CAH organisations in South Yorkshire



Weston Park Museum, Sheffield

There are three main ways to value the hours of voluntary activity: opportunity cost (values the hours volunteered at an individual's wage rate); well-being approach (based on evidence of the positive change in a person's well-being associated with volunteering); the replacement cost (values the hours volunteered at a market wage rage – typically the minimum wage, mean or median wage).

The replacement cost approach is the most comparable to the National Accounts and is used by the Office of National Statistics. **This would suggest that CAH-sector volunteering is worth around £50m annually**. It is important to note that some volunteering supports economic output in the formal economy (volunteers substitute for paid employees) – so there will be some overlap between the £50m estimate and the c.£100m CAH sector GVA.

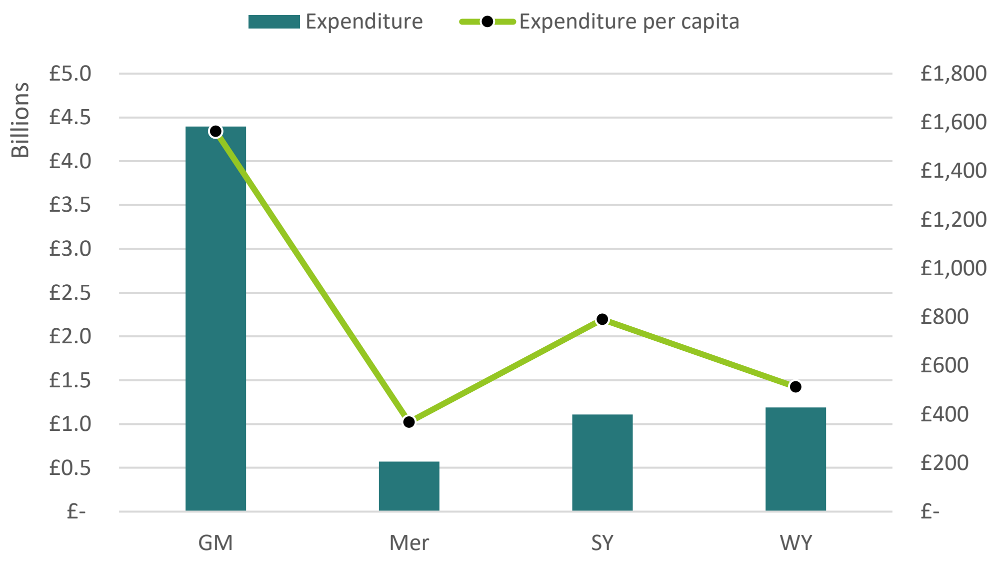
The Civic Gallery, Barnsley

Tourism and the night-time economy

Tourism and the night-time economy are both large sectors of the economy and both are underpinned by a thriving culture, arts and heritage sector. The night-time economy is a fast-growing part of the UK economy. Nationally, it is the UK's fifth-biggest industry, accounting for at least 8% of the UK's employment and annual revenues of £66bn, according to the Night-Time Industries Association[10] . Tourism is also significant with revenues of £48bn and direct employment of 1.4million[11].

Culture is linked to 42% of inbound-tourism related expenditure.[12] South Yorkshire is behind Manchester and West Yorkshire for total visitors numbers (both day visits and overnight tourism), but spend per visit is second only to Greater Manchester (South Yorkshire £36/visit, Greater Manchester £45/visit) and total expenditure close to West Yorkshire which has a much larger population (South Yorkshire £1.1bn, West Yorkshire £1.2bn).[13]

Chart 17. Visitor expenditure, total and per capita, per annum (average 2016-2018), combined authorities



Source: CWE based on Visit Britain

There are 3 local free attractions South Yorkshire in the top 10 most visited in Yorkshire (Millennium Gallery, Sheffield Botanical Gardens and Weston Park) and one just outside (Yorkshire Sculpture Park).

[10] Visit England (2012), "The Evening and Night Time Economy Briefing"
[11] Visit England (2018), "England Tourism Factsheet"
[12] https://www.artscouncil.org.uk/economic-contribution
[13] Visit Britain https://www.visitbritain.org/destination-specific-research

Creative industries[14]

Evidence shows that a strong cultural and heritage offer supports growth in Creative Industries[15]. It enhances the attractiveness of locations to live and work, provides many of the creative skills required and acts as an accelerator for regeneration. The Government's report on creative industries recommended a place-based focus on the cultural and creative sectors as part of its Industrial Strategy.

Nationally this sector grew by 34% (2010-15) – faster than any other sector - and is a net exporter. Jobs in the creative category are highly resistant to automation, with 87% of workers in the UK at low or no risk.[16] Sheffield has been identified as a Creative Industry cluster with 1,825 businesses (7.5% of total) with 6,873 jobs (2% of total) where local university education and research is particularly important[17]. Like the CAH sector, creative businesses in the UK are small and entrepreneurial and employed on average 3.3 workers[18]. Examples of creative industries in SCR include 60% of the UK's educational technology capacity in Sheffield, globally significant digital businesses like Plusnet, Barnsley's Digital Media Centre and the proposed 360-degree film / digital production / postproduction studio in Doncaster.

CAST Doncaster

Doncaster Community Arts (darts) Singing for Memory

Agglomeration / clusters

The economic benefits of spatial agglomeration underpin the concept of city regions. Clustering may support CAH sector productivity in an area by improving the supply of specialist skills, mutual support and flow of ideas (knowledge spill over). It also has potential to support the wider economy – by attracting people and employers to an area and by supplying other sectors with new ideas and skills that enhance innovation.

Our survey for this study provides some evidence of clustering of CAH-sector organisations within South Yorkshire: 59 per cent of respondents to the survey consider their organisation to be part of a local cluster of similar or complementary organisations and/or activities. It is likely these clusters are of benefit to organisations and the success of the sector. Any strategy should consider the extent to which a dense network of CAH-sector organisations and activity can contribute to wider economic success – particularly in attracting professionals with high levels of human capital and high-growth employers[19].

[14] Architecture, Fashion, Publishing, Advertising, Crafts, Music and performing arts, Video, film and imaging (photography), Radio and TV broadcasting, Internet and software, Digital media (gaming and animation) Design (graphic design and web design)
[15]Sir Peter Bazalgette (2017), "Independent Review of the Creative Industries"
[16]ibid
[17] NESTA (2016), "The Geography of Creativity in the UK"
[18] ibid
[19] NESTA (2014), Capital of Culture: What is the impact of arts and cultural clustering on local productivity?

Placemaking

Skilled workers and investors will sacrifice higher earnings to locate in areas with lots of cultural activity – and access to talent is a key success factor in all economic growth strategies but especially in the growing creative and digital sectors. The importance of "place" to the economy is well established. Places need to be "distinctive", have a recognisable variety of people, businesses and culture. The physical and cultural characteristics of a place are most clearly linked to its attraction of talent, business and investment.[20] Evidence from places like London and New York shows that there is a direct correlation between the cultural capital of neighbourhoods and property prices.

Bawtry and Austerfield Illuminate Festival, Doncaster Photographer: James Mulkeen

Bawtry and Austerfield Illuminate Festival featuring Odyssey by Periplum.

Attracting national funding into the area

There are significant levels of funding from national bodies such as Arts Council England and National Lottery Heritage Fund. Some portion of private investment is also likely to be imported from outside the region, providing an additional boost to the local economy. **Indicatively the total amount of funding injected into South Yorkshire through the CAH sector could be of the order of more than £20m annually**.

Grimm & Co, Rotherham

Grimm & Co at Rotherham Show. Photographer James Mulkeen.

[20] Charles Landry and Franco Bianchini, "The creative city" DEMOS in association with COMEDIA

Wider social benefits

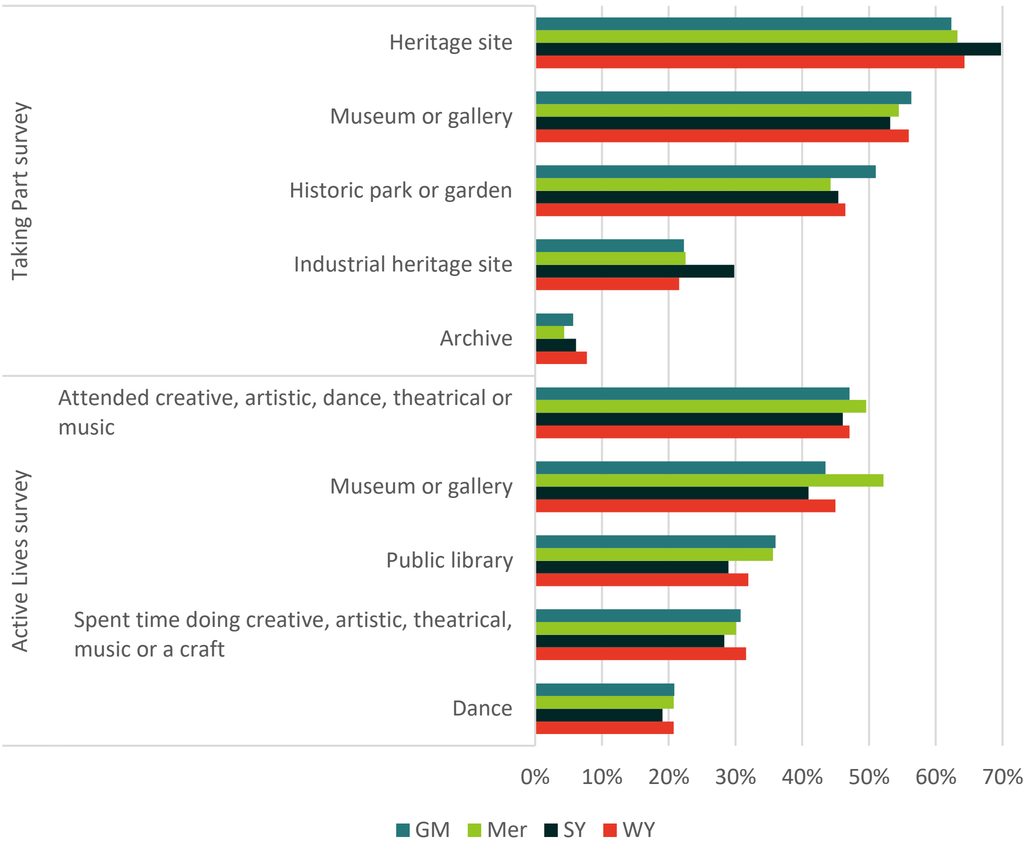
Participation and wellbeing

Participation in CAH activity promotes both personal and community wellbeing, leading to healthier better educated and stronger communities.

Survey evidence suggests that South Yorkshire has higher participation rates for both heritage sites and industrial heritage sites, compared to Greater Manchester, Merseyside and West Yorkshire. Otherwise, participation rates are generally lower compared to the other northern city regions and national averages.

The highest participations in South Yorkshire are people visiting a heritage site (70 per cent); museum or gallery (53 per cent); and historic park or garden (45 per cent).

Chart 18. Adult participation rates for various activities, from the Taking Part survey (2015/16) and Active Lives survey (2015-17), combined authorities



Source: CWE based on the DCMS Taking Part Survey 2015/16 (figures extracted from the RSA Heritage Index 2016) and the Active Lives survey 2015-2017.

Within South Yorkshire, Barnsley, Doncaster and Rotherham are the least engaged.[21] Other evidence from the Active Lives survey also suggests that participants in South Yorkshire spend slightly less time on activities compared to those in other city regions and national averages.[22]

[21] Based on evidence from the Taking Part Survey (contained in the RSA Heritage Index 2016) and the Active People survey from 2010 and the Active Lives Survey from 2015-17.
[22] South Yorkshire has smaller proportions participating 3+ times each year.

Comprehensive evidence reviews by the What Works Centre for Wellbeing found positive impacts on wellbeing from participation, including outcomes such as increased confidence, social connectivity and life satisfaction.[23] A number of studies by the Arts Council and English Heritage provide quantitative estimates of the value of participation. The findings suggest that most types of activity have a value of £1,000-£2,000 per person per year

Based on the evidence we estimate that CAH sector activities in South Yorkshire generate personal wellbeing benefits of around £1.2bn annually from participation by residents (note this does not include personal wellbeing benefits associated with landscape/open space/nature). There is potential to increase this benefit by increasing participation, especially for the excluded who have the most to gain and focussing on activities where participation rates are currently below national averages.

Health

A number of studies have found a positive relationship between engagement in CAH sector activities and good health. Good health outcomes impact positively on personal wellbeing but also benefit the wider community – for example costs savings to the NHS.

The table below presents findings from Fujiwara D et al (2015)[24] and includes estimates for the potential NHS cost savings in South Yorkshire using the participation numbers (adults participating 3 or more times per year).

Table 11. impact and value of the CAH sector on health

Activity	Type of impact	Increase in likelihood of reporting good general health	Reduced likelihood of health service impact	Estimated annual cost savings per (per person)	Estimated NHS annual cost savings in South Yorkshire*
Arts	GP Visits Psychotherapy	5.40%	1.37% 0.45%	£5.07 £6.84	£2.5m £3.5m
Heritage	GP Visits Psychotherapy	2.76%	0.70% 0.23%	£2.59 £3.50	£1.0m £1.5m
Library	GP Visits Psychotherapy	1.12%	0.28% 0.09%	£1.05 £1.42	- £0.5m
Museum	GP Visits Psychotherapy	2.01%	0.51% 0.17%	£1.89 £2.55	£0.5m £0.5m

Source: Fujiwara D et al (2015) and CWE estimates based on that and the participation rates derived from the Taking Part survey

The total annual cost savings to the NHS could be of the order of £10m or more.

Education

Our survey findings suggest the CAH sector plays an important role in education. In the first place it provides an environment conducive to learning and secondly it provides a way of learning that is expansive and unbound.

Higher levels of attainment and human capital can help to boost economy-wide productivity as well as personal fulfilment. There is evidence to suggest that people engaging in CAH sector activities improve their higher/further educational aspirations, higher/further education attendance, and both youth and adult educational performance. There is also a big impact on young people's soft and transferable skills, with 'structured arts' activities significantly increasing cognitive abilities and transferable skills scores .

[23] What Works Centre: Heritage and Wellbeing (2019)

[24] Fujiwara D, Kudrna L, Cornwall T, Laffan K, Dolan P (2015) Further analysis to value the health and educational benefits of sport and culture. Department for Culture, Media and Sport

Evidence from Fujiwara D et al (2015) suggests 16-18-year olds could be up to 1 per cent more likely to go on to further education if they engage in CAH-sector activities (arts, heritage, library). This results in higher lifetime earnings and a public benefit in terms of increased tax receipts for the exchequer.

If we assume that participation increases the probability of going on to higher/further education by 0.5-1 per cent, this suggests the CAH sector in South Yorkshire could be helping to improve the education attainment and lifetime earnings of 250-500 people (16-18-year olds).

Directly measuring the value of human capital is not straightforward, but one approach is to estimate the impact higher education has on lifetime earnings. On this basis, one study found the value of human capital embodied in UK-domiciled 'first degree' graduates to be £63bn in 2014-15 – equivalent to around £195,000 per graduate (net present value in 2015 prices).[25] **This means 250-500 graduates could be worth £55-110m** (midpoint £85m) in net present value terms at current prices.[26]

Some of this human capital may benefit other places – as many of the students going on to higher education may study and stay to work elsewhere. However, the CAH sector may also be an important pull factor for students and graduates into the area. In 2014/15 Sheffield had one of the largest net inflows of students, and it is also successful in retaining a considerable share of its graduates.[27]

The Value of CAH in providing alternative education Pathways and opportunities

CAH can provide learning environments that support alternative routes to employment – for example, backstage and backroom activities that support theatre and cinematic arts require a huge range of applied technical skills. There is potential for cross region training schemes and apprenticeships that build on exciting projects such as the new Doncaster Film and Television Studio on the former Melton Campus of Doncaster College. This will both create jobs and provide extensive training opportunities.[28]

In this context the moves to recognise the true economic value of so called "soft subjects" and to promote them as career pathways at all levels should be noted. The SHAPE campaign seeks to recognise "social sciences, humanities & the arts for people & the economy, is designed to encourage schoolchildren and undergraduates to view these subjects as positive steps towards a high-status career".[29]

Wentworth Woodhouse, Rotherham

Stronger communities

Cultural organisations often bring together different social or generational groups increasing interaction and trust and allowing people to share knowledge, skills and fun. Art and heritage establish meaning, belonging and purpose and encourage a sense of "wellness". Cultural opportunity helps people from a range of backgrounds engage with each other, explore difference safely, help develop shared identities, and promote inclusion. [30] A report into arts and social inclusion in Scotland[31] showed how community participation in arts and heritage delivers social inclusion through improved social networks, a strengthened civic culture, stronger community cohesion, greater trust in fellow citizens and the institutions of government.

There is little doubt about the level of need for social inclusion in South Yorkshire. The Index of Multiple Deprivation places the majority of lower layer super output areas (LSOAs) in the lowest 20% in the UK and a significant number in the lowest most 5%.

Table 12. Index of Multiple Deprivation, South Yorkshire local authorities

		Sheffield	Rotherham	Barnsley	Doncaster
IMD (relative scores)	Decile	*Percentage of LSOAs in each decile*			
Most Deprived	1	23.8	21.6	21.8	23.7
	2	10.4	13.8	17.7	16.5
	3	7.5	13.2	15.0	11.9
	4	6.4	9.6	9.5	9.8
	5	9.0	6.6	10.2	7.2
	6	9.0	10.2	8.2	9.8
	7	7.5	13.2	4.8	8.2
	8	7.8	6.0	8.2	6.2
	9	8.7	6.0	4.1	5.2
Least Deprived	10	9.9	0.0	0.7	1.5

Source: ONS

Educational attainment is patchy with pockets of high engagement surrounded by some of the lowest engagement, aspiration and attainment figures in the UK. Overall, the Education, Skills and Training Deprivation Domain shows the lowest results with the majority of built up areas reporting scores in the lower 20% of all LSOA's in England.

Worklessness figures for the entire region are poor and these correlate with the figures for training and educational attainment and also with the figures for health. This again suggests that a focus on training and on improving health would be of value in addressing employment deprivation.

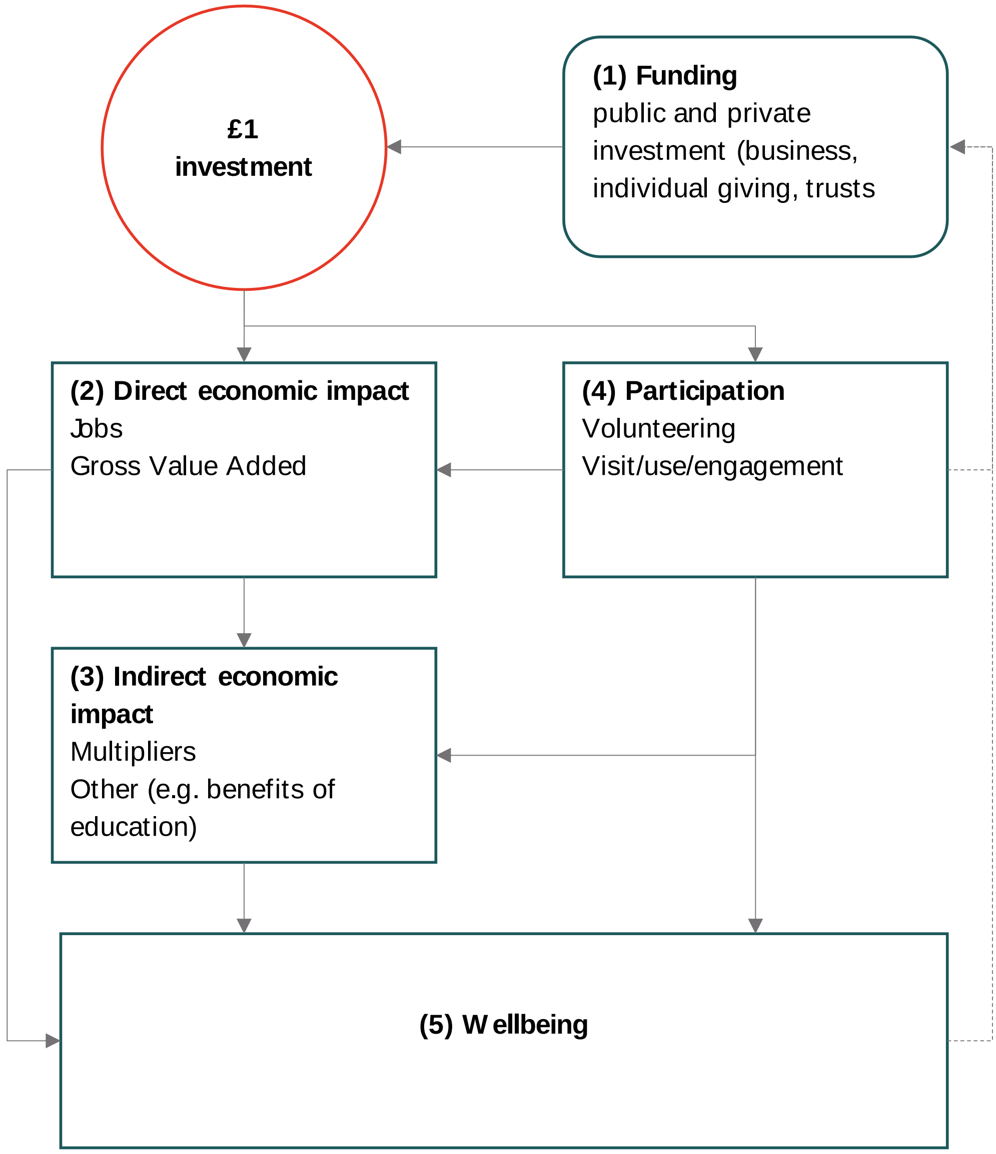
[30] https://whatworkswellbeing.org/product/places-spaces-people-and-wellbeing/
[31] Tom Fleming Creative Consultancy (2015), "Cultural and creative spillovers in Europe" for the Arts Council England

It is beyond the scope of this study to consider specific investment opportunities. However, we examine a number of factors affecting potential returns on investment and differences in these factors within the CAH sector.

General returns on CAH investment

The flowchart below summarises the main impacts from investment. Each £1 invested produces economic impacts (direct and indirect) and outcomes in terms of participation (volunteering and other engagement). Both these things contribute to wellbeing and wider social benefits.

Flowchart: factors affecting returns on investment



Addressing the public funding gap

An important question is the potential scale of investment which in turn depends on the amount of funding available. National funding is of particular interest because it is an additional injection of resources into South Yorkshire, whereas local funding is a redistribution of existing resources.

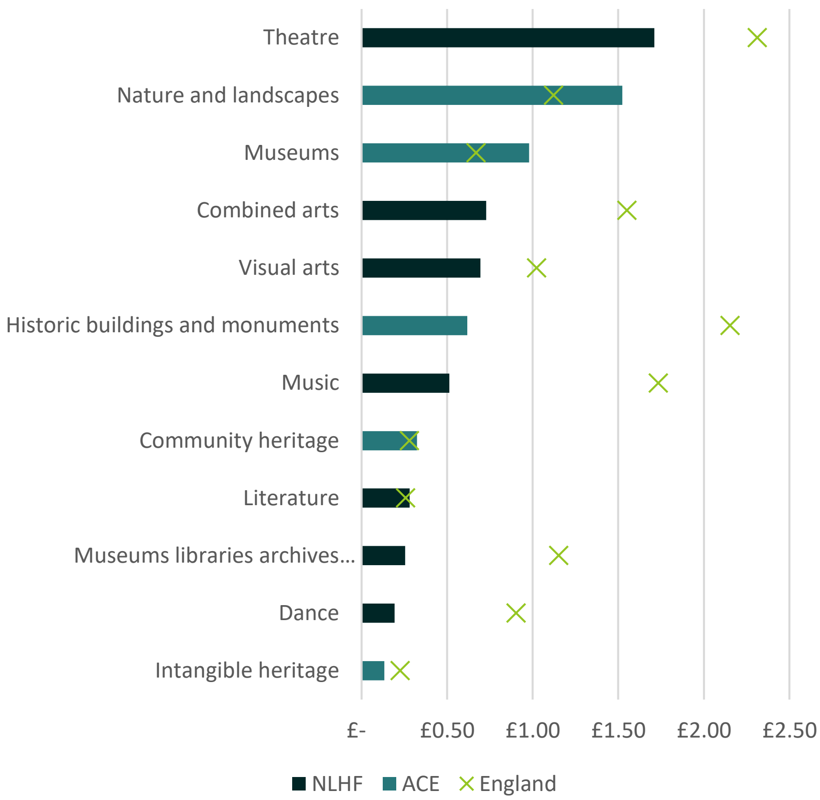
That said, investment leverage is important – national bodies (public and private) will often look for local investment to provide confidence, prove local buy-in and spread the risk. The extent to which local investment attracts funding and investment from elsewhere is important. The more leverage, the more impact there is for each £1 of local spend.

In terms of scale, the main funding bodies to the sector are, as we have seen, ACE and NLHF. It would make sense for South Yorkshire to seek to increase its funding from these sources. If average levels of funding from NLHF and ACE were achieved this could bring in up to £9.5m per annum.

This means:

- Actively supporting bids from the CAH sector which have a good track record of attracting large amounts of funding – this includes theatre, nature and landscapes, and museums.
- Being much better at coordinating bids and presenting a common narrative and the sense that they are part of a wider strategy.
- Making the case for funding levels to move towards national averages. This includes theatre, combined arts, visual arts, historic buildings and monuments, and music.
- Aligning bids and investment decisions to national funding priorities

Chart 19. ACE/NLHF funding per head – South Yorkshire compared to England



Source: CWE based on NLHF and ACE data

If the aim was simply to maximise the amount of funding from national bodies we looked at what should be the areas of focus based on existing funding levels and the shortfall between what South Yorkshire is receiving and the national average. We looked at 4 scenarios with different assumptions about the likelihood of additional funding being achieved (the extent to which funding gaps can be closed).

The scenarios are summarised in the table below.

Funding scenarios

Rank	Scenario 1 (uniform 100%)	Scenario 2 (uniform 20%)	Scenario 3 (variable 20%-43%)	Scenario 4 (variable 26%-88%)
1	Theatre	Theatre	Theatre	Theatre
2	Museums with libraries and archives	Nature and landscapes	Nature and landscapes	Historic buildings and monuments
3	Historic buildings and monuments	Museums with libraries and archives	Museums with libraries and archives	Museums with libraries and archives
4	Music	Museums	Historic buildings and monuments	Nature and landscapes
5	Combined arts	Historic buildings and monuments	Museums	Music
6	Nature and landscapes	Combined arts	Combined arts	Combined arts
7	Visual arts	Visual arts	Music	Museums
8	Museums	Music	Visual arts	Visual arts
9	Dance	Dance	Dance	Dance
10	Community heritage	Community heritage	Community heritage	Community heritage
11	Industrial maritime and transport	Literature	Literature	Literature
12	Not discipline specific	Intangible heritage	Industrial maritime and transport	Not discipline specific
13	Literature	Industrial maritime and transport	Intangible heritage	Industrial maritime and transport
14	Intangible heritage	Not discipline specific	Not discipline specific	Intangible heritage

Scenario 1 assumes that 100 per cent of any funding gaps can be closed, whilst scenario 2 assumes a uniform 20 per cent of any funding gap. Scenario 2 is more realistic, though in practice the extent to which funding gaps can be closed will vary by activity. In particular, there is a stronger case for additional effort / investment in activities where the existing funding gaps are very large. In scenario 3 we assume a range of increases from a minimum of 20 per cent up to a funding level of half the national average. Scenario 4 follows a similar logic but is overall more ambitious.

Whilst there are differences between the scenarios, there is some consistency in the top and bottom priorities. Generally, theatre, nature and landscapes, museums with libraries and archives, and historic buildings and monuments rank highly.

Kelham Island Museum, Sheffield

Right Up Your Street, Doncaster - Eid in the Park
Photographer: Sally Lockey

Economic impact of investment in CAH

If we look beyond maximising public funding and aim to maximise the economic impact of investment, then there are other factors that come into play. With the usual proviso that each project is bespoke, and it is always difficult to estimate the economic impact of investment in generic terms - however, we would note the following:

- Within the CAH sector there are differences between broad sub-sectors, in terms of the relationship between public funding (from ACE/NLHF) and the resulting GVA. Heritage funding is worth around 9% of heritage GVA while the equivalent figure for arts/culture is 15%. In other words, the heritage sector is less reliant on public funding for its output.

- Assuming a similar amount of leverage on future investment, then each £1 of additional heritage funding would deliver more GVA than an equivalent investment in arts/culture (a difference of 1.6:1).

- Conversely, based on average jobs for the period 2015-17 heritage funding appears to support fewer jobs than culture/arts (even after making some adjustment for differences in the proportion of part-time jobs). But there is considerable annual variation in the jobs numbers making it hard to draw firm conclusions about the potential impact of investment.

- As we have seen, there is some differentiation in multipliers by broad sub-sector – both type 1 and type 2 multipliers are higher for heritage than arts/culture.

Sheffield City Hall

The quadrants below summarise investment potential in terms of economic impact (based on funding, funding potential, leverage and multipliers), along with a measure of potential investment scale (jobs). Both investment potential and scale are presented as indices where the maximum is 100 (set in relation to the highest scoring for each variable).

Chart 20. Priorities quadrant: potential investment impact based on funding scenario 2 (uniform 20%)

In this scenario existing levels of funding are maintained, and the overall funding gap closed by 20 per cent – or £1.9m.

The quadrant suggests the following priorities based on the top right-hand panel.

- ‘Nature and landscapes’
- ‘Museums with libraries and archives’
- Theatre

However, ‘museums’ alone is included in the top left-hand panel (a large number of jobs are associated with libraries and archives). Theatres would also be in the top left-hand panel when jobs associated with other performing arts are excluded.

Chart 21. Priorities quadrant: potential investment impact based on funding scenario 3 (variable 20% to 43%)

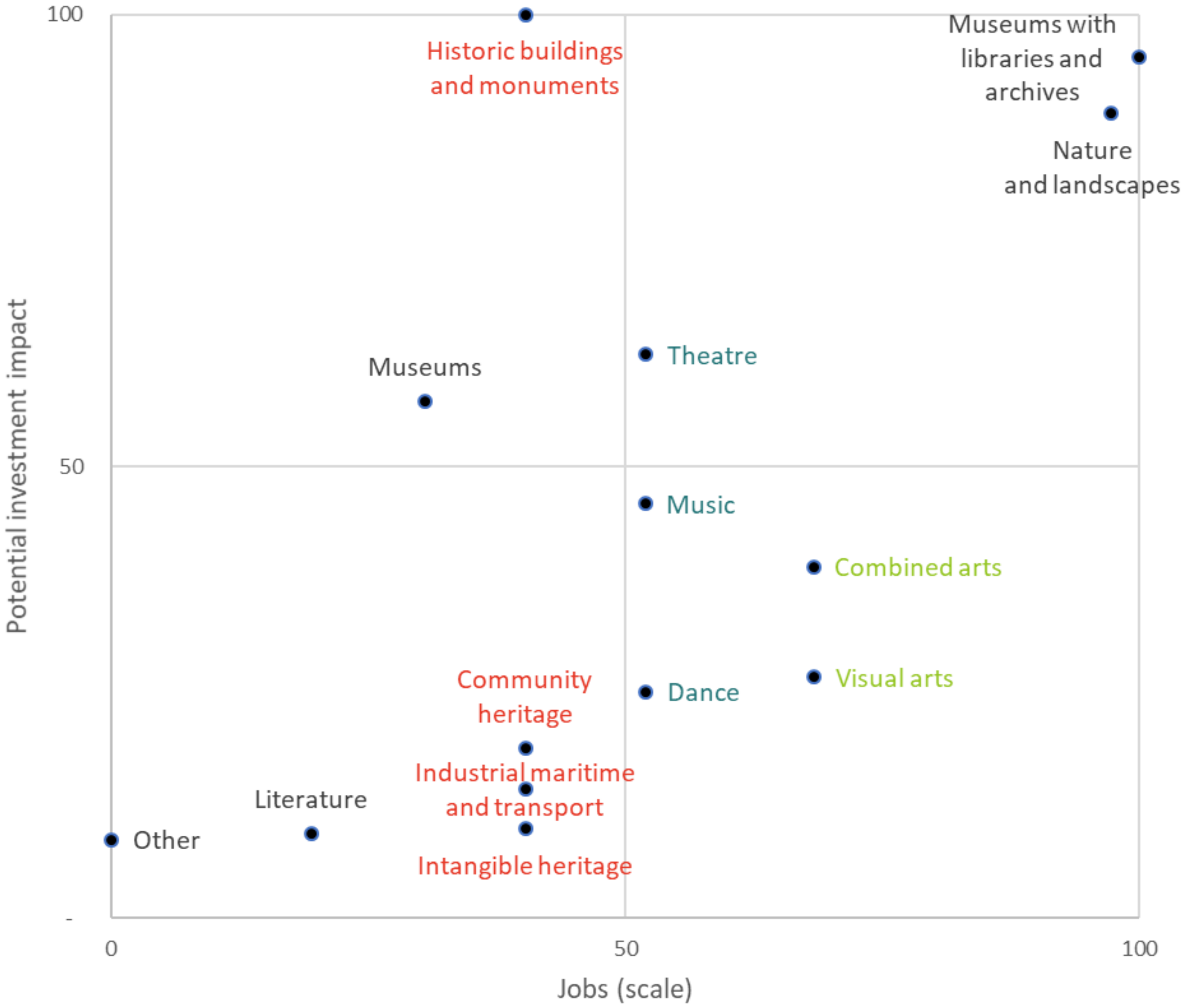
In this scenario existing levels of funding are maintained, and the overall funding gap closed by 27 per cent – or £2.5m.

The priorities suggested are broadly the same as scenario 2 though 'historic buildings and monuments' now have a much higher potential investment impact, yet remain in the top left-hand panel which is determined by the number of jobs (scale).

Newcomen Beam Engine, Elsecar, Barnsley. Artist Wayne Sables with Jump Primary. Photographer: Dominic Somers.

Worsborough Mill Pond. Photo credit: DVLP.

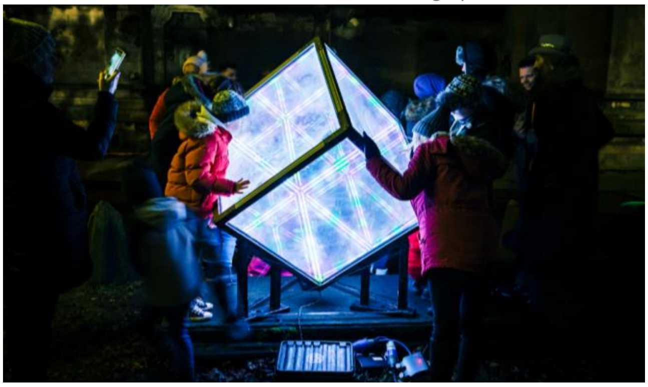
Chart 22. *Priorities quadrant: potential investment impact based on funding scenario 4 (variable 26% - 88%)*



In this scenario existing levels of funding are maintained, and the overall funding gap closed by 60 per cent – or £5.7m.

The priorities are broadly consistent with the previous scenarios, however 'museums with libraries and archives' is now ranked above 'nature and landscapes'. 'Historic building and monuments' remains in the top left-hand panel but now has the highest potential investment impact overall. Music is also now ranked higher overall.

Festival of Light, Hypercube by The Queen of Hearts
Photographer James Mulkeen



Tramlines Festival, Sheffield

Summary

There are some differences between the scenarios, but overall, we suggest the following categorisation in terms of funding prioritisation and maximising economic and social impact.

Category 1:
- nature and landscapes;
- museums with libraries and archives

Category 2:
- theatre;
- museums;
- historic buildings and monuments

Category 3:
- combined arts;
- music;
- visual arts

Category 4:
- community heritage
- industrial heritage
- dance
- industrial maritime and transport;
- literature

It should be emphasised that this is informed by an element of judgement and not entirely driven by the data. Nevertheless, the scenarios considered illustrate a degree of consistency due to large differences between activities in terms of current levels of investment, the size of funding gaps, as well as differences between sectors and sub-sectors in terms of current scale, funding leverage and multiplier effects.

Peak District National Park

SWOT analysis

We have done a SWOT analysis based on the interviews we undertook. This suggests there is significant potential drawing on both the strengths and opportunities and the chance to address some of the weaknesses.

- Our analysis suggests that investment in ‘nature and landscapes’, museums, theatre and ‘historic buildings and monuments’ offer the best economic returns in generic terms – and South Yorkshire has significant assets in these categories.

- The stated priorities for NLHF (subject to Covid-19 recovery of course) include landscapes and nature and community heritage where South Yorkshire has significant opportunities. The Arts Council has more generic priorities around creative people and cultural communities but again there are opportunities.

- The low current levels of public sector funding (both nationally and locally) means that any concerted moves to support local bids and try and shift this towards national averages offers significant potential to grow. As noted above average levels of funding from NLHF and ACE could bring in up to £9.5m per annum. If local authorities were also able to move towards national average funding this could be increased further.

- Participation rates in the CAH sector are below national averages in South Yorkshire which means that any concerted moves to increase this offers significant potential to a) increase revenues, GVA and jobs in the sector and b) increase the wellbeing benefits for residents.

Elsecar, Barnsley. Gemma Nemer. Photographer, James Mulkeen

- The number of visitors is also relatively low which suggests that there is potential to increase this. If the strong attractions of the area were combined with a strong narrative and good marketing this could help grow the visitor economy as well as the CAH sector.

- We do not have data on the extent to which the South Yorkshire CAH sector supports local supply chains. However, a concerted effort to promote local suppliers could increase the GVA multiplier for the sector.

- There are good relationships at regional level and the organisational weaknesses (lack of strategy, sector leadership, join-up, investment programme etc) are relatively easy to fix.

- There is a commitment to address the issues around the CAH sector at city regional level and in the Strategic Economic Plan.

Elsecar, Barnsley. Frumptarn Guggenband. Photographer James Mulkeen.

What is the potential?

The full potential of the sector will never be realised without investment and targeted interventions to make it happen. Some of that investment will be forthcoming from existing public and private funders. If the city region also aims to get more involved, then based on the analysis above the sort of interventions that are likely to be successful are:

Interventions that increase density / clustering of successful, innovative CAH enterprises

- Key investments in nature and landscapes, museums, theatre and historic buildings and monuments.
- Support for networking and mutual information exchange, innovation etc within the sector.

Interventions that leverage national funding

- Supporting bids with a good track record and aligning bids and investment decisions to national funding priorities.

Interventions that support new and existing CAH businesses

- Examples include business support, access to finance (including help with coordinating bidding etc), partnerships, collective branding / marketing etc.
- Develop CAH centres – especially heritage sites – as "maker places" creating and shaping new objects, food and drink – this creates ultra-local supply chains and opens up opportunity for sales of products to "remote visitors" who get to experience the locality through products as well as virtual visits.
- Develop elements of homeworking to enable groups previously excluded from the workplace to regain entry or to achieve income while juggling multiple commitments. Such homeworking schemes revive old methods of manufacture but have been shown to be effective (see for example Community Opportunity's "Bermondsey Uprising" model[32])

Interventions that support local supply chain development

- Work with existing CAH business to develop local supply chains, build networks and keep economic benefits within the region.

Interventions that boost engagement

- Increased participation generates revenue for CAH businesses and spreads the social benefits of participation much more widely.

Interventions that spread the benefits of the CAH sector around the region

- Increase the community benefits.

Interventions that engage people in education and training

- *Learn Local - Train Local – Gain National Skills*: The range of skills required in CAH goes far beyond curatorship or site management – it encompasses a tremendous breadth of technical and craft skills. These are best taught in a work-based situation – the model of focused training typified by Higher Rhythm in Doncaster could be replicated across the full span of CAH activity in the region.

Developing a CAH investment programme has many benefits but it will require proper structures to make it effective.

Chapter 4 – Unlocking the potential

Why invest in CAH?

Culture, arts and heritage is like any other economic sector where public sector involvement is required to address areas of market failure (skills, innovation, coordination, infrastructure, attracting external investment etc). However, it is also more complex because the benefits go much wider than other business sectors (community cohesion, local identity, individual and community wellbeing, place making etc). Even though these benefits are hard to capture and quantify in financial terms they are real and so the case for public involvement and investment (and even direct subsidy) is recognised.

Doncaster Community Arts (darts) Microbes Dance Workshop

Successful places are not just defined by their economic output, they have a high quality of life, creative vibrancy and a sense of cultural identity. Culture, Art and Heritage should therefore be at the heart of any growth agenda. It is a source of direct growth and jobs - but also a source of innovation and skills. The sector makes South Yorkshire a great place to live, work, visit, and invest; it attracts talent, supports the visitor economy and drives investment into vital cultural assets.

Right Up Your Street, Doncaster The Urban Astronaut Photographer: James Mulkeen

There is already recognition in the draft Sheffield City Region Strategic Economic Plan of the need to focus on inclusive, sustainable growth and includes recognition that 'place' and 'culture' are important. The focus on "good growth" helps respond to the challenges of productivity, decarbonisation and inequality. CAH has a vital role to play in meeting those challenges:

- boosting productivity by retaining talented people and attracting new investors to locate in the region;
- boosting health, wellbeing, education and skills so that people are better able to access good opportunities;
- boosting town and city centres with rich CAH offers attracting residents and visitors from across the country.

Barnsley Poet Ian McMillan. Photographer James Mulkeen

[32] https://communitysouthwark.org/organisations-venues/organisations/bermondsey-uprising

Structures to promote the CAH sector

While each local authority in South Yorkshire have their own cultural structures and processes there is little at city region level which is a serious gap. Establishing regional structures must reflect culture, arts and heritage assets, capacity, and politics (big P and little p) - there is no right or wrong answer but collective buy-in is important.

Promoting culture, arts and heritage is a long-term process and there are no quick / one-off fixes. All the evidence suggests that investment in single big cultural or sporting events (City of Culture, Olympics) produces short term returns but has little or no lasting economic impact. Proposals to make a difference therefore need to be long term and should aim to create strong, resilient networked clusters of arts and heritage institutions. However, there are some basic principles to consider when designing local structures.

Leadership

Strong Leadership is required to make things happen and get people working together. This is often more important for Culture, Arts and Heritage because the sector is complex (crosses private, public and 3rd sectors) has lots of often small but fiercely independent institutions and has multiple and diverse objectives and outcomes. Good leadership can therefore provide:

- *Convening power within the sector* – *b*ringing together the diverse and independent institutions and get them to participate in, and own, and help facilitate a common narrative / strategy for CAH, as well as pooling resources.

- *Convening power within the region* – It is also necessary to bring together local council and other public sector actors to do the same – not just cultural services but also schools / education, health / wellbeing, planning / licencing, business support / inward investment. Businesses and other private sector actors also need to be brought inside the tent if possible.

- *Advocacy* – making the case for CAH across business and politics. Imposing a common narrative, being the public face of the sector and promoting the region to the local public and beyond.

- *Governance* – building robust partnerships, developing new structures and strategies and prioritising interventions and investments.

- *Delivery* – overseeing and driving the delivery of a CAH strategy once adopted

Of those Mayoral city regions that have made an explicit push on culture, all have appointed leaders but in different ways. London has a Deputy Mayor for Culture and Creative Industries who is an ex-Greater London Authority official; Greater Manchester has two cultural portfolio leads, one political (leader of Bolton Council) and one official (Wigan Chief Executive); the West Midlands has a political portfolio lead while Merseyside has two leaders from the sector co- chairing the Cultural Partnership. The proposals to appoint an Arts and Culture Lead for Sheffield City Region (SCR) is a welcome step. As well as being the right individual they will need:

- enough administrative resources to be effective;
- to work very closely with the existing cultural and heritage leads in local authorities and key institutions.

Ownership and buy-in from the sector

A strategy imposed from above will not work so involvement and ownership by the sector is vital. This is why other city regions have invested in cultural forums to help facilitate that. Examples include:

- *West Midlands Cultural Leadership Board* – to provide advice on strategies to: improve cultural provision and inclusive growth; promote landmark events and opportunities; increase cultural engagement; develop representative cultural sector leadership; help the sector to become more entrepreneurial; maximise funding opportunities; aid collaborations, networks and cross-sector alignment.

- *Greater Manchester Culture Steering Group* –guides work being done to help support and help the culture, arts and heritage sectors, representing national cultural organisations as well as home grown artists and organisations.

- *London Cultural Leadership Board* – to steer the delivery of the Mayor's policy pledges; help to shape the Mayor's Culture Strategy and keep the Mayor abreast of issues facing the creative industries and culture sector.

- *Liverpool City Region Cultural Partnership* – aims to develop a joined-up vision and strategy for art, culture and creativity, oversee the development and delivery of the Culture and Creativity Strategy, representing cultural organisations, the media, Universities and local authorities, alongside representation from the Liverpool Arts and Regeneration Consortium (LARC).

Such forums are important for sector involvement and buy-in. Membership is always a balancing act. Small enough to be effective but big enough to ensure representation from different sub-sectors, geographies and institutions. The existing Sheffield Culture Collective could be a model for a wider SCR body.

Rotherham Show. Photographer James Mulkeen.

Wentworth Woodhouse, Rotherham. Artist Mark Productions. Photographer: James Mulkeen.

A Culture, Arts and Heritage strategy

Some Local Authorities in South Yorkshire have individual cultural strategies. The lack of a strategy at SCR level was noted by some national funders who commented on 'uncoordinated and overlapping bids' from the region. Developing a strategy is important and should add value because it:

- Helps ensure agreement about the priority objectives of interventions in culture and heritage. As noted above this sector is complex because the objectives go well beyond easily quantifiable metrics like growth and jobs. If interventions are also addressing a wide variety of outcomes like wellbeing, identity or placemaking, agreement on what should be achieved is especially important.

- Helps prioritise interventions, and in particular it can identify strengths that can be built on, reinforce the agreed narrative and support the long-term vision.

- Helps to coordinate interventions, initiatives and bids – funding and other interventions from local authorities, city region and external (ACE, HLF others) can hopefully support each other rather than be competing or contradictory.

- Provides a framework against which decisions on interventions can be judged, because investment decisions in CAH are often less 'technocratic' than in other areas.

- Provides a 'narrative of place' to both frame decisions but also attract investment. External investors need to know that their involvement / funds will be coordinated.

A good strategy manages to encompass the "long term vision" and the "narrative of place" which are vital but can be quite intangible – alongside the road map of how you get there, the more practical and hard edged priorities and short term action plans. It needs to inspire while also giving confidence to those focusing on value for money in funding bodies. There is no reason why a Strategy needs be overlong or complex however it does need to be specific enough to help with all the points above.

Music in the Round, Sheffield
Schubert in Schools
Photographer: Fraser Wilson

Building a narrative of place

Place-making depends on being able to identify and articulate clear stories about a locale which helps to engage people – whether they are visiting or resident. At present there are a wide variety of narratives being employed across South Yorkshire and these largely reflect local borough strategies. No clear high-level narrative has yet been developed.

Examples of high level narratives used to bring competing interests together might include that developed for the Ironbridge Gorge in Shropshire and the Slate Industry in North Wales – in both cases these were used to support bids for World Heritage Site status and to create a region branding able to integrate a number of disconnected site-based stories.

The development of this narrative for South Yorkshire should be a collective effort of key cultural and heritage institutions, the four boroughs and their communities. It should be a priority and should underpin the wider strategy. While this report does not seek to pre-empt the search for a narrative there are some clear themes that emerged from our interviews.

The real roots of the industrial revolution

It can be argued that the industrialisation of England has its roots in the medieval period and the complex social and economic consequences of the "Black Death". The iron industry in particular has deep roots in the South Yorkshire – Chaucer mentions a "Sheffield Thwitel" (knife) in the Reeves Tale in the 1380s and it is clear that his audience would have understood this to mean high quality. The recent work to uncover the remains of Sheffield Castle and the number of early ironworking sites in the region offer a potential baseline story (with the added attraction of a passing mention of Robin Hood). Upon this can be built a story of the developing complexity of iron working and craftsmanship through the post-medieval period and the dawn of the Industrial era.

Shaping the land, a heritage of water

Water underpins the shaping of the land and provides the driving force and a transport system for the industrial revolution. This links the landscape of dams and reservoirs in the western part of South Yorkshire to the landscape of canals and tramways in the middle Don and the drainage of the eastern part to create the Humberhead levels. This operates on all timescales and geographies.

A diversity of peoples

The rapid growth of the industrial towns and cities of South Yorkshire was fuelled by the inward migration of people not just from the surrounding countryside but also from much further afield. This story of internal migration and its consequences has rarely been explored but may be relevant in placing more recent immigration in a long-term historical context.

Derwent Dam

Cusworth Hall

Prioritisation

Given resource constraints, interventions (at any level) have to be prioritised if they are going to have an impact and help unlock the potential of the sector. As ever there is no right answer to doing this and decisions are never purely technocratic. However, a basic check list should be:

- Make decisions in line with the strategy – so there is a greater chance of individual decisions being aligned and supporting each other and targeted at a common set of objectives.
- Aim for long term sustainability rather than just a series of one-off events and ensure that there are metrics to track progress.
- Aim to support and build on areas of existing strengths in order to improve the chances of sustainability and to build specialist clusters. This does not necessarily mean supporting existing institutions but area strengths.
- Recognise the strength of very local knowledge and local decision making and ensure that there is a balance between regional and local decision making.

The detail of how proposals are assessed is important. Treasury Green Book processes are good at quantifying economic outputs and comparing similar schemes (i.e. one road scheme against another road scheme). However, it is much weaker at assessing interventions with a wide range of beneficial outcomes, many of which are not quantifiable.

Resources and capacity

In a world of limited resources, it is right to try and maximise direct investments and minimise resources on administration and support. However, taken to extreme this can undermine the effectiveness and impact of the individual interventions. On a basic level there is a need to fund strategies, advisory boards, decision making processes, etc noted above.

In addition, the CAH sector has particular characteristics which make wider generic support both more necessary and more impactful. Those characteristics include:

- large numbers of individuals / micro businesses;
- large numbers of third-sector organisations reliant on volunteers / non-experts; and
- an overly complex funding landscape that requires bureaucratic expertise to find your way through.

When we asked organisations in SCR what would help the sector most there were a few areas that had wide support. Three areas of potential support that should be considered include:

Support for networking / partnership	For the reasons noted above many in the sector can be quite isolated and unable to tap into the support, ideas and opportunities that comes from working together. The benefits of such networks include mutual support, pooling resources, forging ideas and opportunities, coordinated activities etc.

Our survey responses show a diverse network of partnerships across the region with councils and universities highlighted as key players. 74% of survey respondents said that they were involved in some form of sector partnership or network. **Cultural Education Partnerships** are widely cited and play an important role bringing together local partners – including schools, the local authority, voluntary and community organisations – to drive a joined-up local arts and cultural offer, to share resources and bring about a more coherent and visible delivery of cultural education . The **Sheffield Cultural Consortium** is an example of a local authority supported network group. The **Sheffield Creative Guild** is an example of a self-supporting bottom-up networking organisation.

The idea of strengthening partnerships was one of the most popular areas cited for improvement in the survey. Comments included: *'Stronger partnership working'*; *'collaboration across areas and arts sectors'*; *'a wider network of similar groups for sharing ideas and good practice'*; *'bringing public, private and voluntary sector leaders together to build a strong, cohesive and resilient South Yorkshire'*.

There was also acknowledgement that networks often require public sector support to make them effective *'secretariat functions to bring partners together'*; *'local authority action to promote links between voluntary organisations'*.

Business support

Like any other sector, culture and heritage businesses need support to overcome the barriers to growth. Much advice would be the same as for any business, but other areas would be quite specialist (navigating bidding / grant funding, accessing and dealing with volunteers etc). The Sheffield City Region Growth Hub has supported over 6,000 businesses and helped to create over 1,500 jobs, and it is worth exploring if a more specialist support for this sector offers similar value for money. Survey responders also raised specialist support: *'additional training would be useful as would financial and mentoring support'*; *'support for organisations in terms of digital expertise'*.

Joint marketing

Pooling resources to produce joint marketing material for the region makes obvious sense which again was highlighted by many survey responders: 'more news and recognition of art galleries and exhibitions'; 'better promotion'; 'coordinated presentation of the heritage and culture available in the county'. Others mentioned the importance of 'celebrating' the culture and heritage offer locally. Changes at Welcome to Yorkshire offers opportunities if it is decided to go with a wider Yorkshire brand but having a strong clear narrative for South Yorkshire will be vital irrespective of the route taken.

WE Wonder Noir at Wentworth Woodhouse, Rotherham. Photographer James Mulkeen.

Chapter 5 – The additional challenge of Covid-19

The impact of Covid-19 on the CAH sector has been severe

The Covid-19 pandemic has had and will continue to have a severe impact on the CAH sector in South Yorkshire and across the UK and the world. In England 78% of employees in arts, entertainment and recreation have been furloughed compared to an average across the country of 29% (only hotels and restaurants are higher at 80%[33]). 90% of private or 3rd sector heritage organisations say there is a threat to their long-term viability and 56% of museum and gallery directors are similarly concerned about long-term viability[34].

Our own survey of the CAH sector in South Yorkshire asked respondents to describe the impact of Covid-19. The message is like the national picture, with severe disruption to activities and a major hit on income levels. However, there is a mixed picture on financial resilience in the very short term.

- Almost all respondents reported impacts (moderate to severe) on their organisation and activities including fund-raising.
- 80 per cent mentioned closures, cancellation, or postponement of planned activities.
- A high proportion mentioned reduced income and, in some cases, a total loss of income. A few respondents had little impact now (April) but anticipated difficulties soon.
- Several organisations said they were currently able to manage the financial hit – by managing costs and drawing on reserves. However, others said they do not have any core funding or reserves. They rely on project funding linked to delivery and would need to negotiate with funders.
- Some respondents said project funding may no longer be available due to slower delivery and/or loss of match funding.

Other issues raised included the impact on staff and volunteers, the impact on partners and suppliers and concerns about ability to reach out to those most in need during the lockdown – elderly and other vulnerable groups.

Current mitigation by businesses in the CAH sector includes cutting expenditure, looking for new income and tapping into sector and central government programmes

We asked respondents to describe what they are doing to manage the impact. As you would expect the sector is being pro-active and having to make difficult decisions quickly. These actions centre around:

Reducing expenditure – Businesses have furloughed and laid off workers and are trying to negotiate reduced rents. One respondent said, *"We have had to strip back activity for the remainder of the year to ensure we re-allocate some spending to ensure we can remain afloat as an organisation."*

Looking for new sources of income – There is some evidence of income generation from online sales – but it is mainly about maintaining audience interest during the lockdown and for most organisations no substitute for business as usual. Some talked about adapting their business model and develop new income streams, however as one said we are *"working with both artists and the community to deliver a new achievable programme of work. This process is slow but possible."*

Businesses are drawing on reserves and trying to fundraise – although clearly this is difficult given that much of the public is also less financially secure during the pandemic.

[33] www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/furloughingofworkersacrossukbusinesses

[34] https://www.artfund.org/blog/2020/05/28/covid19-impact-research-report and https://www.heritagefund.org.uk/blogs/how- coronavirus-covid-19-affecting-heritage-sector

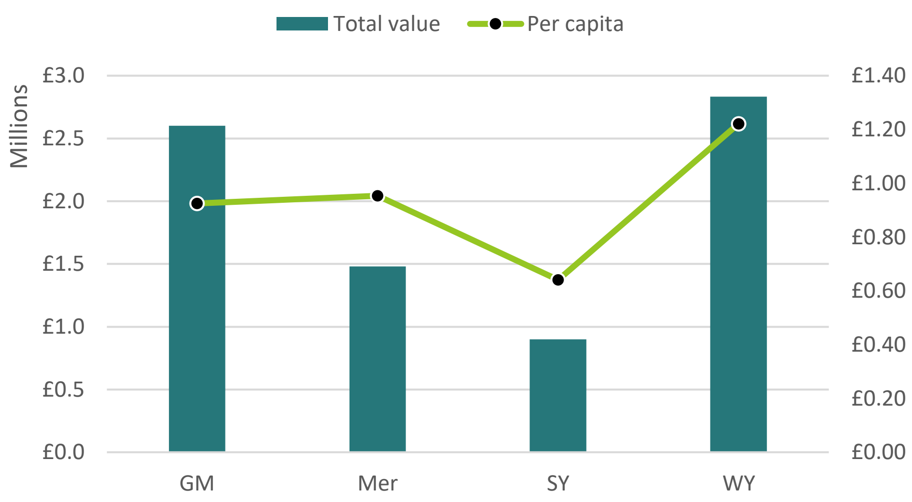
"We are trying to raise income through public donations and merchandise sales, but we need grant funding if we are to survive."

Sector Funding – Funding bodies are critical in this sector and respondents talked about both negotiating to re-profile delivery and applying for emergency funding from the Arts Council and others. These bids are often linked to adapting their business model –

- *"We applied for ACE emergency funding to create a strategy of online tuition and re- structuring work"*
- *"We successfully applied to the Arts Council with a bid that will cover our rent and the wages of our two working staff members for six months. It will also pay for a website redevelopment and for new tech that will enable us to move more of our offer online."*

NLHF are distributing a £50m emergency fund but we do not have a breakdown yet of how this has been allocated. ACE have allocated £160m for emergency funding and they have also announced flexibility in the use of current grants and extended National Portfolio support for an extra year. As of June 2020, they have awarded £64.8 million to 10,000 people and organisations (outside the National Portfolio) of which nearly £900,000 has gone to 206 people and organisations South Yorkshire.

Chart 23 ACE Emergency Awards (phases 1 and 2) to June 2020, combined authorities



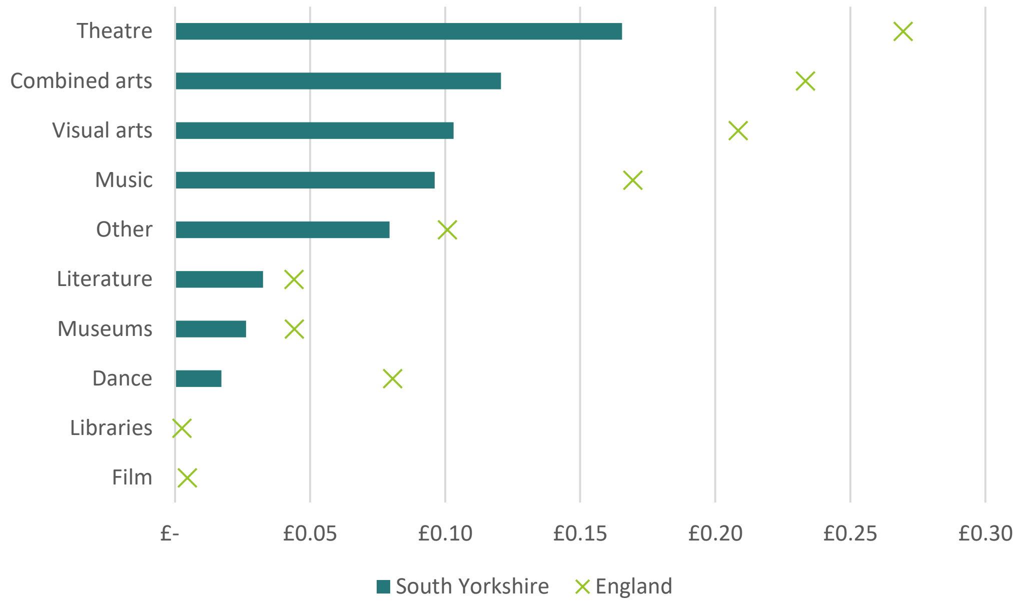
Source: CWE based on Arts Council England

Table 13. per capita ACE awards

West Yorkshire	£1.22/person
England	£1.16/person
Merseyside	£0.95/person
Greater Manchester	£0.92/person
South Yorkshire	**£0.64/person**

Source: CWE based on Arts Council England

Chart 24. ACE Emergency Awards (phases 1 and 2) by discipline, South Yorkshire compared to England



Source: CWE based on [Arts Council England]

Overall, funding to South Yorkshire is around 55 per cent of the national average on a per capita basis. The total funding shortfall is worth around £720,000.

Central Government funding - Wider Government support has been important, and a significant number raised the furlough scheme and other support. As noted previously the CAH sector is not straightforward due to the profusion of micro businesses, charities, self-employment, and contract / grant funded activities. This makes eligibility for government support problematic for some, for example charities do not pay business rates so are ineligible for relief, fully public-funded bodies are ineligible for the furlough scheme while self-employed grants can get complex if you are combining paid employment with contract work. The overall impression is that, beyond the furlough scheme organisations are looking more towards funding bodies like ACE than they are to wider government loans / grants.

Beyond finance virtually all respondents mentioned their use of social media and other technology for online sales, learning /teaching, keeping in touch with members and audiences, and other activities – e.g. online/digital events.

There are big uncertainties about the longer-term effects, but there will likely need to be changes to business models

Like any other sector of the economy CAH will be affected by the coming recession – although we do not yet know whether this will be a V shaped, U shaped or L shaped recession. However, we know that the sector:

- lacks resilience - for example self-employment in arts and culture in the UK is very high (37%[35] compared to other sectors - 15%[36]) and that the self-employed earn 68% (male) and 56% (female) of the equivalent direct employee average earnings;
- has been one of the hardest hit by the pandemic (alongside the tourism, entertainment, and night-time economy sectors).

There are also big uncertainties about the process of reopening the economy. While this has started many arts and culture businesses are still closed given that they are often deemed to be high risk (crowds gathering in concerts/theatre/heritage venues/ museums

[35] Eurostat https://ec.europa.eu/eurostat/statistics-explained/index.php/Culture_statistics_-_cultural_employment#Self- employment
[36] ONS
www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/trendsinselfemploymentintheuk/2018-02-07

etc) and perceived as low priority (not critical to wider food / manufacturing supply chains etc). There is also a risk of a second wave and further lockdowns creating greater uncertainty.

There are also big unknowns around long-term changes in behaviour because of the pandemic. More homeworking seems inevitable, with knock-on implications such as the impact on city centre footfall. Other potential (but uncertain) issues impacting the CAH sector include the future of large gatherings, different behaviour of young and old, impacts on volunteering etc.

We asked respondents to our survey to describe how Covid-19 is likely to affect them longer term. Unsurprisingly there is a high level of uncertainty given that there is so much we do not know. Responses generally separated in to the more or less optimistic.

- The less optimistic voiced concerns that lockdown impacts will be extended because people will still be afraid, even when the restrictions are lifted. Many CAH organisations have members or audiences who are older and may be less willing to return to pre-pandemic activities. There were linked concerns for organisations generally who are reliant on mass attended events.

- The more optimistic said they expected only limited long- term effects and that the sector is flexible and will able to adapt for example using opportunities for growth in outdoors activities.

In terms of finance there were concerns over medium / longer term income given the economic impact on funders and that capital projects many need to be shelved for some time

Two specific issues that many respondents mentioned were technology and the need to make more / better use of this in future and new business models – reflecting the need for more resilience. Changing business models will be inevitable and any interventions in the sector should help to support this change. Some ideas on those changes include:

<u>Social distancing</u>
Longer term social distancing will favour open air activity that enables spacing and reduces interaction. This implies investment in open air performance / display facilities in parks, gardens, and wild spaces (e.g. parking, access, naturalistic staging, toilets, etc.). Also needed is investment in technology based interpretive materials for self-guided tours (both in person and virtually) of places / displays.

<u>Specialisation / local authenticity</u>
Changes to tourism will be important with a reduction in visitors from overseas and increased UK holidays and day-visits. This could reinforce current trends towards the “authenticity” of the experience of place. Locally sourced food reflecting regional recipes and food styles can play an important role in this and provide a major opportunity for local food and drink producers. Heritage sites – with their ability to tell local stories – can inform and promote local foods and their historical or cultural significance. A database of local food and drink producers and a South Yorkshire food and drink marketing strategy could underpin this.

There are similar authenticity trends with visitors seeking out holiday purchases which have a specific link to a given location or activity. The opportunity for local artists and craftspeople is considerable. Again, cross region marketing and a strong on-line presence and shop will be vital to reaching virtual visitors. If virtual visitors can be persuaded to purchase food, drink or objects/products/artworks associated with a locality this may well act as a catalyst for an actual visit as the restriction ease. Local crafts are themselves visitor attractions and craft hubs at key locations / heritage sites have a role as do country houses as productive centres – which is often overlooked as an avenue for diversification.

Educational opportunities

Covid-19 has had a massive impact on young people's learning and employment prospects. As well as the immediate use of CAH to support primary and secondary educational catch up with open air and socially distanced learning there are also opportunities CAH to deliver skills based around work and apprenticeships. Unlike 2009/10, the coming recession is likely to see high unemployment and there is talk of a "retraining revolution" to provide new skills for young people and those facing redundancy. There is scope for deeper engagement between CAH and further and higher education to create CAH based skills training opportunities. This is also a major opportunity for CAH organisations to diversify income by engaging with this skills / training revolution.

There are strong arguments for investment in CAH to have an important role in the South Yorkshire recovery programme

To date the focus of central government Covid-19 responses has been on short term support. The £1.5bn of longer- term grants and loans announced in July is therefore very welcome. However, the detail will be important. Firstly, it is not clear whether this £1.5bn is genuinely additional to existing DCMS spending plans or the timescales over which this funding is available. It is also important to understand how it will be distributed - especially given the shortfall per capita of emergency ACE funding to South Yorkshire.

Sheffield City Region (SCR) is developing a Covid-19 Economic Recovery Plan (ERP). The aim is to provide immediate relief (<1 year), prepare the region for recovery (1-3 years), and to build up overall resilience for the long-term (3+ years).

Given the uncertainties this is looking at different scenarios, assessing the likely impact of Central Government responses and identify the gaps where further local interventions are required. The Strategic Economic Plan (SEP) will continue to be the SCR's overarching strategy and the Economic Recovery Plan will act as a bridge to that wider long-term strategy.

Given that the draft SEP emphasises the importance of the CAH sector in the long-term economic future of the region we would hope that this is also reflected in the ERP as the "bridge" plan.

The arguments for investment in CAH set out in this report remain valid in the light of Covid-19 – if not more so. The unique aspect of CAH investment is the wide range of social and economic benefits alongside the direct economic effects. In a post-Covid world where there has been such significant economic and community disruption this is important. Examples of why a CAH focus to support recovery makes sense includes:

- Large parts of the CAH sector can be turned on relatively quickly with events and commissions without the need for large capital investments or complex supply chains – it is therefore a good place to look if you want rapid economic impacts.
- CAH is a very flexible, adaptable (and creative) industry and is able to adapt to new circumstances – and being forced to adapt might make it stronger in the long term.
- The existence of a £1.5bn recovery fund for arts and culture means that interventions required to help the sector access central funds (set out in Chapter 3 - support, strategic coordination, match funding etc) are even more urgent.

- The lockdown has highlighted the importance of and raised the profile of parks / gardens / open public space as well as town centres and investment and events can help those places come alive and open them up to a wider audience.

- CAH has an important role in bringing people and communities together after the crisis, both to celebrate key workers and community solidarity and to memorialise the dead but also to build confidence in the future.

- There has been significant educational disruption and by September many children will have had no school for nearly 6 months. CAH offers ways to bring learning to children outside of the classroom.

- More generally the lockdown has had a significant impact on mental health, and we know the positive impact that CAH has on wellbeing. If ever there was a time to deploy this as an intervention it is as part of a Covid-19 recovery.

- Economically CAH investment has a close link to and can help support those sectors badly hit by the lockdown (tourism and the night-time economy).

- CAH also supports fast growing creative industries. An example is online educational materials which has a strong presence in South Yorkshire which will have received a major boost. They will need to keep attracting the best creative people if they are to stay in Sheffield.

The South Yorkshire economy as a whole remains vulnerable. The response to the 2008 crash was a particular focus on employment – which was understandable but left the region with too many low pay/low value-added jobs. The new draft Strategic Economic Plan seeks to address this, and it will be important to come out of the coming recession with a more robust well- rounded economy and a strong CAH sector has an important role to play in that.

Annex A – Definition of culture, art and heritage used

The scope of the CAH sector was agreed at an inception meeting for the project, involving officers from the four authorities. A wide range of activities were considered taking account of official statistics definitions, reports produced for heritage and cultural organisations and local knowledge.

Table A1. 4-digit Standard Industrial Classification (SIC) codes considered at the scoping stage

SIC	Description	Rank
3212	Manufacture of jewellery and related articles	1
3220	Manufacture of musical instruments	1
5811	Book publishing	1
5920	Sound recording and music publishing activities	1
7420	Photographic activities	1
8552	Cultural education	1
9001	Performing arts	1
9002	Support activities to performing arts	1
9003	Artistic creation	1
9004	Operation of arts facilities	1
9101	Library and archive activities	1
9102	Museum activities	1
9103	Operation of historical sites and buildings and similar visitor attractions	1
9104	Botanical and zoological gardens and nature reserve activities	1
1820	Reproduction of recorded media	2
4763	Retail sale of music and video recordings in specialised stores	2
5821	Publishing of computer games	2
5829	Other software publishing	2
5911	Motion picture, video and television programme production activities	2
5912	Motion picture, video and television programme post-production	2
5914	Motion picture projection activities	2
6010	Radio broadcasting	2
6020	Television programming and broadcasting activities	2
7410	Specialised design activities	2
5813	Publishing of newspapers	3
5814	Publishing of journals and periodicals	3
5913	Motion picture, video and television programme distribution	3
6201	Computer programming activities	3
7021	Public relations and communication activities	3
7111	Architectural activities	3
7311	Advertising agencies	3
7312	Media representation	3
5812	Publishing of directories and mailing lists	4
5819	Other publishing activities	4
6202	Computer consultancy activities	4
7430	Translation and interpretation activities	4

The table below compares the scope/definition of the sector with other sources/studies.

<u>Table A2</u>. CAH sector compared to DCMS sectors

SIC	Description	DCMS		Arts Council	SCR
		Creative	**Cultural**	**Arts/Culture**	**CAH**
1820	Reproduction of recorded media		x		
3212	Manufacture of jewellery and related articles	x	x		x
3220	Manufacture of musical instruments		x		x
4763	Retail sale of music and video recordings in specialised stores		x		
5811	Book publishing	x		x	x
5812	Publishing of directories and mailing lists	x			
5813	Publishing of newspapers	x			
5814	Publishing of journals and periodicals	x			
5819	Other publishing activities	x			
5821	Publishing of computer games	x			
5829	Other software publishing	x			
5911	Motion picture, video and television programme production activities	x	x		
5912	Motion picture, video and television programme post-production activities	x	x		
5913	Motion picture, video and television programme distribution activities	x	x		
5914	Motion picture projection activities	x	x		
5920	Sound recording and music publishing activities	x	x	x	
6010	Radio broadcasting	x	x		
6020	Television programming and broadcasting activities	x	x		
6201	Computer programming activities	x			
6202	Computer consultancy activities	x			
7021	Public relations and communication activities	x			
7111	Architectural activities	x			
7311	Advertising agencies	x			
7312	Media representation	x			
7410	Specialised design activities	x			
7420	Photographic activities	x	x		x
7430	Translation and interpretation activities	x			
8552	Cultural education	x	x		x
9001	Performing arts	x	x	x	x
9002	Support activities to performing arts	x	x	x	x
9003	Artistic creation	x	x	x	x
9004	Operation of arts facilities	x	x	x	x
9101	Library and archive activities	x	x		x
9102	Museum activities	x	x		x
9103	Operation of historical sites and buildings and similar visitor attractions		x		x
9104	Botanical and zoological gardens and nature reserve activities				x

Annex B – Data and analytical detail

Gross Value Added

GVA is a measure of the value from production used in the national accounts and can be thought of as the value of 'industrial' output less the value of input used to produce that output. DCMS produces GVA estimates, at national and regional levels, for various sectors, including "Cultural" and "Creative" (see annex for definitions). The latest regional statistics for 2017 (marked "provisional") are presented below.

Table B1. DCMS Cultural Sector GVA estimates, 2017

Region	GVA £m	% all sectors
North East	232	0.4%
North West	1,272	0.7%
Yorkshire and The Humber	586	0.5%
East Midlands	425	0.4%
West Midlands	797	0.6%
East	1,030	0.7%
London	20,082	4.6%
South East	2,331	0.9%
South West	918	0.7%
UK	29,481	1.60%

Source: DCMS 2017 Regional GVA

Table B2. DCMS Creative Industries GVA estimates, 2017

Region	GVA £m	% all sectors
North East	1,025	1.9%
North West	5,832	3.3%
Yorkshire and The Humber	2,877	2.4%
East Midlands	2,452	2.3%
West Midlands	3,733	2.8%
East	6,067	3.9%
London	52,225	12.0%
South East	16,913	6.3%
South West	4,182	3.2%
UK	101,526	5.5%

Source: DCMS 2017 Regional GVA

There are overlaps between "Cultural" and "Creative" so their combined contribution to total GVA is less than their sum.

A different definition was agreed for the purposes of this report – referred to as the CAH sector – and further details are set out in Annex A. The table below compares regional estimates on this basis (average 2015-2017).

Table B3. SCR CAH sector GVA estimates, average 2015-17, regional

Region	GVA £m		% all sectors	
	from	to	from	to
North East	155	185	0.3%	0.4%
North West	590	855	0.3%	0.5%
Yorkshire and The Humber	335	455	0.3%	0.4%
East Midlands	300	340	0.3%	0.3%
West Midlands	535	720	0.4%	0.6%
East	685	825	0.5%	0.6%

London	7860	8595	1.9%	2.1%
South East	1835	2265	0.7%	0.9%
South West	700	920	0.5%	0.7%

GVA rounded to nearest £5m
Source: CWE based on ONS regional GVA and other sources

The numbers show the sector of interest makes a similar direct contribution to the economies of all three northern regions[37] (0.3-0.5%). This is much lower than London (1.9-2.1%) and the South East (0.7-0.9%).
The CAH sector estimates for this study are based on ONS regional GVA estimates in combination with other statistics, notably the DCMS regional GVA statistics and the Business Register and Employment Survey.[38]

Multipliers

The tables below provide a summary of multiplier estimates for the UK, England and Northern regions (North East, North West and Yorkshire and the Humber), by broad sector (arts/culture and heritage).[39]

Table B4. GVA multiplier estimates, reference year 2016

Sector	Area	Direct	Indirect	Induced	Multiplier	
					Type I	Type II
Arts/culture	UK	£ 1.00	£ 0.45	£ 0.69	1.45	2.14
Arts/culture	England	£ 1.00	N/A	N/A	N/A	2.00
Arts/culture	North	£ 1.00	£ 0.49	£ 0.42	1.49	1.91
Arts/culture	NE	£ 1.00	N/A	N/A	N/A	1.83
Arts/culture	NW	£ 1.00	N/A	N/A	N/A	1.91
Arts/culture	YH	£ 1.00	N/A	N/A	N/A	1.95
Heritage	England	£ 1.00	£ 0.68	£ 0.53	1.68	2.21
Heritage	NE	£ 1.00	£ 0.44	£ 0.37	1.44	1.81
Heritage	NW	£ 1.00	£ 0.65	£ 0.48	1.65	2.13
Heritage	YH	£ 1.00	£ 0.63	£ 0.51	1.63	2.14

Source: CWE compilation of evidence from CEBR reports for Arts Council England and Historic England

Table B5. Job multiplier estimates, reference year 2016

Sector	Area	Direct	Indirect	Induced	Multiplier	
					Type I	Type II
Arts/culture	UK	1	0.78	0.87	1.78	2.65
Arts/culture	England	1	N/A	N/A	N/A	2.31
Arts/culture	North	1	0.68	0.53	1.68	2.21
Arts/culture	NE	1	N/A	N/A	N/A	2.10
Arts/culture	NW	1	N/A	N/A	N/A	2.21
Arts/culture	YH	1	N/A	N/A	N/A	2.26
Heritage	England	1	0.78	0.56	1.78	2.34
Heritage	NE	1	0.49	0.39	1.49	1.89
Heritage	NW	1	0.74	0.52	1.74	2.26
Heritage	YH	1	0.73	0.54	1.73	2.27

Source: CWE compilation of evidence from CEBR reports for Arts Council England and Historic England

[37] North East, North West, Yorkshire and The Humber
[38] The low-end estimates reflect the latest ONS regional GVA estimates (published Dec/2019) whilst the high-end estimates reflect earlier ONS regional GVA estimates (published Dec/2018).
[39] Sources: Arts Council England 2019a; Arts Council England 2019b; Historic England 2019; Historic England regional heritage and economy reports 2019

Further evidence on multiplier effects is presented below from the ONS, Scottish Government and NISRA (Northern Ireland Statistics and Research Agency) providing a sense check on the above estimates.[40] The data also enable comparison across sectors.

Table B6. National GVA multipliers for CAH-relevant sectors, reference year 2016

Indicator	Area	Direct	Indirect	Induced	Multiplier	
					Type I	Type II
GVA	UK	£1.00	£0.64	N/A	1.64	N/A
GVA	Scotland	£1.00	£0.35	£0.33	1.35	1.68
GVA	NI	£1.00	£0.71	N/A	1.71	N/A

The estimates for Yorkshire and The Humber are most relevant to this study. The multipliers for South Yorkshire may be smaller than those of the wider region – on the basis smaller economic areas may be more likely to draw on suppliers and leak expenditure further afield.[41] Other factors such as differences in sector composition and economic structure can however serve to either reinforce or counter this effect.

A 2008 English Partnerships publication provided a comparison of Type II multipliers for four types of property related activity: office, general industrial/warehousing, recreation and retailing. Recreation is the most relevant to the CAH sector – and the highest of multiplier of the four types (local area multiplier of 1.38 and regional multiplier of 1.56).

An important question is whether CAH sector multipliers are larger than other sectors. The UK type I GVA multiplier for CAH-relevant sectors is 1.64, slightly above the all-sectors median of 1.61. In other words, the CAH sector multiplier is larger than 50 per cent of sectors in the economy.

Volunteering

Evidence and assumptions to estimate the value of volunteering:

- Proportion of adults who have volunteered in the last 12 months (Yorkshire and The Humber 2018/19): 25.9 per cent (lower estimate: 22.4; higher estimate 29.8 per cent).[42]
- Proportion of adults whose volunteering was connected to the arts, museums/galleries, heritage, libraries or archives (England 2018/19): 18 per cent (lower estimate: 14.7; higher estimate 22.3 per cent).[43]
- South Yorkshire adult (age 16+) population in 2018: 1,140,394.
- Median hours worked per week (South Yorkshire 2018): 37.5 (full time); 18.7 (part time).[44]
- CAH sector jobs (see jobs section of this chapter): 58% (full time); 42% (part time).[45]
- Hours spent volunteering per month (England): 6.9 hours mean average (2015); 13.6 hours mean average or 8 hours median average (NCVO, 2019).[46]
- Value of volunteering per hour based on market prices (South Yorkshire, 2018): £14.58 (mean) and £11.49 (median).[47]
- Value of volunteering per hour (England, 2015): £14.43.[48]

[40] UK (ONS, United Kingdom Input-Output Analytical Tables, 2016); Scotland (Scottish Government, Supply, Use and Input-Output Tables, 2016); Northern Ireland (NISRA, Supply-Use Tables and Multipliers, 2016)
[41] See for example: What Works Centre for Local Economic Growth paper and also English Partnerships Additionality Guide: "The size of the multiplier effects: these are likely to be greater as there are more opportunities for economic linkages in terms of suppliers and local expenditure than there are in a smaller geographical area."
[42] DCMS, Taking Part 2018/19
[43] Ibid. Note this is for England as regional estimates not available.
[44] Nomis
[45] BRES
[46] ONS, 2017, Challenges in the value and division of unpaid volunteering in the UK: 2000 to 2015 and NCVO, 2019, Time Well Spent. Both studies are national, not regional.
[47] Nomis
[48] ONS, 2017, Billion pound loss in volunteering effort

Personal wellbeing

Evidence and assumptions used to estimate the value of personal wellbeing:

- Number of adult participants by main activity in South Yorkshire – based on South Yorkshire's adult population (ONS mid-year estimates) and evidence on participation rates from the Taking Part (Yorkshire 2018/19) and Active Lives (South Yorkshire 2015-17) surveys
- Proportion of the adult population participating at least 3+ times per year – based on evidence on frequency from the Taking Part (England 2018/19) and Active Lives (South Yorkshire 2015-17) surveys.
- Personal wellbeing benefit – £1,000 per person annually (informed by the various Fujiwara studies and recognising the Fujiwara estimates are considered upper bound estimates)
- Proportion of the benefit derived from participation within South Yorkshire – 70 per cent (informed by evidence on travel distances).[49]

Education

Main assumptions used to estimate the value of education:

- As per above (personal wellbeing) but based on the population aged 16-18 and with adjustments made to participation rates for this age group (reflecting evidence in Taking Part and Active Lives surveys – where the nearest reference group is 16-24 years)
- Based on Fujiwara D et al (2015) a range of 0.5-1 per cent is applied to the number of 16-18 year olds participating regularly (3+ times per year).

- An estimate for the additional human capital associated with the number of 16-18 years olds graduating as a result of participation CAH sector activities is based on the net present value of the increase in their lifetime earnings.

[49] For example, a national survey shows that around half of day visitors in Britain travel no more than 20 miles. Day trips do not include visits taken on a regular basis or within the participant's 'usual environment' – so regular participation is more likely to involve shorter distances. Visit Britain (2018) The Great Britain Day Visitor 2018 Annual Report

Annex C – Survey results

A questionnaire was sent out to around 300 organisations in South Yorkshire and received 88 unique responses.

Respondents were asked to indicate their principal activity as follows:

Table C1. Respondents by principle activity

Activity	**%**	**Count**
Visual arts	7%	6
Theatre	8%	7
Music	15%	13
Museums	7%	6
Literature	0%	0
Libraries and/or archives	5%	4
Dance	2%	2
Combined arts	9%	8
Nature and landscapes	6%	5
Operation of historical sites / buildings and similar visitor attractions	7%	6
Other (please specify below in answer to question 5)	32%	28
Blank	3%	3

35 per cent of respondents were unable identify with one of the principal activities listed but can be categorised as follows on the basis of free text responses:

- Sector portfolio / partnership organisation (#6)
- Neighbourhood / community group (#3)
- Church or Council (#2)
- History education/research (#3)
- History group / society / charity (#10)
- Near match to one of the categories listed in the table (#4)
- Other (#3)

The table below provides a clearer representation of principle activities – with history and historic sites being the largest category (24%). A notable number of organisations are involved in or support a wide range of activities across the sector – including partnership organisations and community groups. Such organisations often play an important role in facilitating and supporting the sector.

Table C2. Respondents by principle activity – adjusted

Activity	**%**	**Count**
Visual arts	9%	6+2
Theatre	8%	7
Music	15%	13
Museums	7%	6
Literature	0%	0
Libraries and/or archives	5%	4
Dance	2%	2
Combined arts	9%	8
Nature and landscapes	6%	5
History and historic sites (promotion and/or operation)	24%	6+10+3+2
Cross-sector	13%	6+3+2
Other	3%	3

Survey questions

1. Do you agree to take part in this survey sent to you by ChamberlainWalker Economics? (yes; no)
2. Please provide the name of your organisation
3. Please provide the postcode(s) of your venue(s) or base location in South Yorkshire
4. Please indicate whether your principal activity can be categorised as one of the following (multiple choice: visual arts; theatre music; museums; literature; libraries and/or archives; dance; combined arts; nature and landscapes; operation of historical sites / buildings and similar visitor attractions; other please specify)
5. Please provide a short description of your organisation's main activities
6. Please indicate the number of paid employees (full time equivalent) in your organisation in South Yorkshire (multiple choice: 1-10; 10-40; 50-249; 250+; N/A (no paid employees))
7. Please provide details of any local sector partnerships or networks your organisation is part of
8. Do you consider your organisation to be part of a local cluster or similar or complementary organisations and/or activities (multiple choice: yes; no; not sure)
9. Please indicate annual turnover (or revenue) from your activities in South Yorkshire (multiple choice: £0-£49,000; £50,000-£99,000; £100,000-£199,000; £200,000-£499,000; £500,000-£999,000; £1m or more)
10. How reliant is your organisation on private donations and/or corporate sponsorship? (multiple choice: not at all; slightly; moderately; very; extremely)
11. Please indicate whether your organisation receives funding e.g. grants from one or more of the following (multiple choice: Arts Council England; National Lottery Heritage Fund; Historic England; local authority; other national; other local)
12. If you answered "other national" or "other local" to question 11, please list the main funding bodies/providers
13. How reliant is your organisation on financial support e.g. grants from funding bodies (as indicated in your response to the previous two questions)? (multiple choice: not at all; slightly; moderately; very; extremely)
14. Please indicate the number of volunteers (if any) working for your organisation in South Yorkshire (multiple choice: none; 1-5; 6-10; 11-24; 25-50; more than 50)
15. Please indicate whether your organisation provides or supports any of the following activities in South Yorkshire (multiple choice: education and training; local business support; community support; place-making or regeneration; other (please specify below)
16. Please provide a short description of how your organisation contributes to the local community and economy
17. Please describe the impact of COVID-19 on your organisation and its activities
18. Please describe what your organisation is doing to manage the impact
19. Please describe how COVID-19 is likely to affect your organisation and activities longer term
20. Please describe what would help to improve the sector (culture, arts and heritage) in South Yorkshire?

Additional survey evidence

73 per cent of respondents said their organisations is involved in a local partnership or network. The table below summarises some of the local partnerships and networks referred to in answer to question 7.

Table C3. Selected local sector partnerships and networks

Local sector partnership or network	**Count**
Local Cultural Education Partnerships	12
Local Council / SCR	8
University (Sheffield or Hallam) or college	7
Joined Up Heritage Sheffield	6
Sheffield Culture Consortium	6
Local Music Hub	5
Sheffield Creative Guild	4
Creative People and Places (includes Flux Capacitator and Right up Our Street)	4
Heritage Open Days	4
Local Museums	4
Classical Sheffield	3
WE Great Place	3
Making Room	3
Volunteer libraries network	3
Dearne Valley Green Heart Partnership and Dearne Valley Landscape Partnership	3
Ruskin in Sheffield	3
Local business group / Chamber of Commerce	3
Yorkshire Visual Arts Network	2
Freelands Artist Development Programme (Site Gallery)	2
British Film Institute Hub North / Talent	2
Sheffield Digital	2
SCR Music Board	2
Theatre Deli Sheffield	2
Cast Theatre Doncaster	2
Local heritage association	2

Respondents indicated varying degrees of reliance on funding from sources other than those listed in question 11. The table below provides a list of selected national and more local funding bodies referred to in answers to question 12.

Annex C4. Selected funding bodies referred to be respondents to the survey

National	**More local**
Bramall Foundation	Brelms Trust
British Film Institute	Doncaster Civic Trust
D'Oyly Carte	Freshgate Trust Foundation
Esmee Fairbairn Foundation	Sheffield Town Trust
Foyle Foundation	South Yorkshire Community Foundation
Freelands Foundation	The JG Graves Charitable Trust
Garfield Weston Foundation	The Shaw Lands Trust
Golsoncott Foundation	
National Churches Trust	
National Lottery Awards for All	
National Monuments Conservation Trust	
National Trust	

Natural England The Charles and Elsie Sykes Trust The Elephant Trust The Radcliffe Trust Woodland Trust	

Annex D – SWOT analysis

Strengths

Organisational

- There are some good, long standing working relationships across SCR at political and functional levels – relative to other areas
- Some culture strategies etc (e.g. Rotherham) but patchy and not joined-up
- There is a wide recognition of the need to address weaknesses around culture, art and heritage and to make more of the sector and integrate it into the economic strategy.
- Mayor seen as very credible with good links to Whitehall/Ministers and the city-region considered efficient (by the centre) with sound procedures
- The agreed Devo Deal provides a launch pad (and some resources) for moving forward with new approaches and new initiatives. Culture Commissioner proposal is a good start.
- Universities in Sheffield (40,000 students) offer clear creative capacity and sector audience

Sector Organisation

- Sheffield Culture Consortium (sector leadership) Sheffield Creative Guild (bottom-up body) and Sheffield Culture Collective (wider body) seen as good examples to build on.

Sector Assets

- Diversity of the sector .
- Heterogenous distribution of assets – some areas dearth of assets, others a wealth.
- Potential to develop a strong and differentiated narratives with Sheffield and Conisborough Castles, early industrial sites from mill dams to forges to coal pits. Potential to explore human role in shaping the landscape (e.g. The Humberhead levels).
- Clear strength in Industrial Heritage for example at Wortley Top Forge, Abbeydale and Elescar. This is supported by industrial and specialist museums.
- Very early river navigations and a diversity of canals. Water spaces present opportunities for integrated environmental management. Opportunities to grow the network especially though footpath extensions.
- Early Railways and a network of historic railways offer opportunities for interpretation of impact in a day to day setting. Abandoned railways offer trails and footpath conversion – need to protect routeways for both canal and disused rail wherever possible.
- Transport heritage is patchy – there is only one heritage railway in the SCR but there is an outstanding road transport collection in the South Yorkshire Transport Museum.
- Strong museum collections, materials and archives.
- A vibrancy of local culture not always recognised in the mainstream but visible by the strength the local music scene, the number of community theatres and arts events.

Narrative

- Massive fund of stories to draw on to connect / join up assets (more than sum of parts)
    - Mediaeval South Yorkshire and the real origins of the industrial world
    - People and landscape – Landscape with Windmills -creating the Humberhead Levels
    - The rivers railways and King Coal
    - A Region of makers from Chaucer's "Sheffield Thwitle" to the present.
    - A diversity of People – Inward migration and the creation of South Yorkshire
- Strong story around Sheffield. City of makers (scale), steel and music

Weaknesses

Organisational

- Good inter authority working arrangements tempered by lack of explicit engagement on culture and heritage in recent years.
- Relations between B/D/R better or easier than between B/D/R and Sheffield. Inherent tensions based on size and resources. Risk of Sheffield having parallel structures and dominating.
- All authorities have drastically cut resources for culture and heritage since 2010 but South Yorkshire Authorities went further, and deeper Sheffield singled out as coasting after lots of investment in early 2000s.
- Lack of administrative capacity alongside lack of programme investment (although some moves to address this in some areas).
- Lack of any joined-up culture / heritage structures across SCR or any culture / heritage strategy or priorities across SCR – lack of overall leadership of sector in region.
- Lack of an overall strategy – existing culture strategies and plans are seen as too heavy on "vision" and light on properly resourced deliverable.

Approach

- Still a political tendency to see culture / heritage investment through the prism of city centre regeneration and capital investment led (Forge Island, Winter Gardens, Heritage Action Zone) Sometimes viewed as 'pet local projects. At the same time there is political caution and fear of producing resource hungry White Elephants (Popular Music Centre, Magna)
- Too Inward-looking / lack of ambition to be of national/international relevance/importance – especially relative to Liverpool, Manchester, Leeds…
- Lack of any place-making / place shaping or culture/heritage in the current SCR Strategic Economic Plan. Part of a conscious approach when drafting to focus on jobs – but without a big focus on job quality or economic resilience.
- Funders / Sector sometimes focused on passive (imported) consumption rather than creativity / making / producing etc. Success measured via box office rather than wider economic and social impact.
- Lack of joined-up bidding for resources, multiple overlapping bids. HLF –" South Yorkshire has least joined-up applications in N England". Lack of any thematic approach linking different organisations/assets, lack of coherent narrative and conflicting / competing bids reflected in lack of success in competition for funding. Lack of Arts Council funding in particular (less per capita than other areas in North) – reflects many of the above points

Sector Organisation

- No strategic overview of the sector across SCR or any SCR wide sector bodies
- Lack of significant local private philanthropy for culture/heritage – or engagement of possible sources (Cutlers?)

Sector Assets

- Sector assets remain dominated by local councils (even when hived off to 'trust' ownership. Institutions therefore is Council-led but assets handed over to trusts and funding cuts (too many small trusts, fragmentation, not enough critical mass)
- Low levels of public participation and engagement with the sector
- Over reliance on volunteers, lack of administrative capacity.
- Heterogenous distribution of assets – some areas dearth of assets, others a wealth
- Under-utilised assets/activities

Narrative

- Lack of any clear culture / heritage narrative for shaping economic investment, priorities or marketing
- In the absence of positive narrative, 3 image shaper films dominate wider views of the region (Kes, Full Monty, Brassed Off) all of which are quite bleak underneath the humour. Feed into a "crap towns" image / mentality.

Opportunities

Economic and Organisational

- Many of the organisational weaknesses above are relatively simple and quick to fix. E.g. Set up processes to coordinate bidding for national funds linked to an SCR strategy.
- As well as coordinating bids, programme could put together pooled bids and support bids with expertise and pooled analysis / presentation resources and mentoring support.
- If SCR gets into supporting / investing in culture / heritage they should amend their assessment process, including changes to Green Book approach so that the social return and wider benefits of culture are fully represented in decisions.
- More explicit recognition that culture/heritage generate skills needed by creative industries (which has grown much faster than the wider/South Yorkshire economy. Link to fast growing EdTech sector in Sheffield and potential film sector in Doncaster.
- Funding opportunities (Northern Cultural regen fund, green infrastructure investment)

Sector Organisation

- Changes at Welcome to Yorkshire opens up opportunity to take a new approach to collective marketing (whether with or without Welcome to Yorkshire).
- Opportunities to create regional clusters – e.g. links between Barnsley and Sheffield theatres.
- Improve linkages between cultural organisations and universities in SCR

Sector Assets

- Underutilised disused railways and canals – open up as nodes and routeways (potentially low investment if "managed decay" rather than refurbishment – e.g. former River Itchen Navigation near Southampton)
- Wentworth and Elsecar Great Place – one of the greatest national opportunities including skills training (building and engineering conservation), performing arts, studios, small scale manufacturing.
- Tourism – promoting cultural and heritage destinations, esp. post Covid.
- Making more of local produce and production – keeping culture spending in local economy.
- Using heritage as place-making, creating vibrant spaces, trigger for creative maker activity.
- Post-COVID greater public and political acknowledgement about importance of parks and open space. SCR particularly rich in these - join up green spaces – cycleways, walkways etc.
- Opportunities explored during lockdown of different ways of doing culture – like online access to collections (tapping into a new audience so not zero sum).
- Likely to be a need post Covid for culture to be used to maintain community solidarity, celebrate heroes and mourn the dead. A good time to 'creative with culture.'
- Draw lessons from Leeds and consider cultural acquisitions / invitations to outside bodies and mergers of in-region bodies to get scale and pulling power.
- Improve local participation rates – low base makes this possible and impactful.

Narrative

- Putting together a strong narrative to support investment, bidding and marketing can be done relatively quickly, given good raw material.

Threats

- A long and /or deep Post Covid-19 recession reduces the level of public and private resources available for culture and heritage
- Long lockdown drives a significant % of the sector out of business due to lost income and increased unsustainable debt
- Political (big P and small p) attraction of mega projects leads to misguided investment – white elephants with little lasting impact and absorbing all resource/effort. Rather, need to nurture a cultural ecosystem.
- Changes / delays to retirement could undermine volunteer base.