



**A Creative and  
Cultural Economic  
Impact Assessment  
and Asset  
Infrastructure Audit**

**Executive Summary**  
for Hull City Council,  
December 2023



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## Management Summary

This short management summary highlights the key headlines from a review of the economic impact of Hull's Creative Industries and Cultural Sector and an infrastructure review of key assets – places and spaces where cultural activities occur. The study used desk research, economic analysis and primary research with stakeholders.

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An exciting and challenging time for the creative and cultural sector in Hull

There is a new Cultural strategy planned in 2024. The City Council is also formulating plans to bid for UNESCO City of Music status in 2025 as well as building on its reputation as an emerging filming location. This is against a backdrop where resources and audiences are affected by the current economic climate.

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Hull has almost 7,000 people working in the cultural and creative sector.<sup>1</sup>

The 6976 strong creative and cultural workforce is substantial but proportionately lower than the national level or comparator cities. Hull's software sub-sector has experienced the biggest growth since 2015 (161.7%) and there is a small but growing film and TV sector. The low numbers of those involved in music captured in official statistics do not reflect the 200-300 bands that we know exist anecdotally. The number of firms (430) increased slightly between 2015 and 2021, however that is from a low base; the concentration is close to half the national average. The software sub-sector is Hull's largest numerically whilst 'originals' is the largest concentration-wise, reflecting the city's creative technology and manufacturing credentials. Official statistics are a blunt instrument failing to capture the valuable work of occasional creatives, freelancers and the self-employed. Creative employment would be 32% higher taking these into account, some 2,232 employees.

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The sector is a vital part of Hull's economy, employment and well-being.

The total value of the sector in Hull was £0.46 billion in 2021: comprised of £225m direct gross value added (an increase of 20% in six years), £79m of indirect benefits and £157.4m induced impacts. There are many wider benefits which transcend these economic values. These include £14.2m of residential spend on creative and cultural events and activities, £18.0m and £2.7m of volunteering benefits and well-being volunteering benefits and some £25.9m well-being benefits for those participating in creative and cultural activities.

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<sup>1</sup> Economic Statistics are derived from ONS Business Counts and the Business Register and Employment Survey using a pre-agreed sector definition based on SIC codes. As SIC figures only account for PAYE or VAT registered employees, freelancers/self-employed are often omitted however steps have been taken to mitigate this as mentioned in chapter 2 of the report.



**£224.8m**  
Creative and Cultural Sector GVA (2021)  
**+20.0%** from 2015



**£37,443**  
Creative and Cultural sector GVA per employee (2021)  
**+11.9%** from 2015



**£2.6m**  
Music Sector GVA (2021)



**£12.3m**  
Film and TV Sector GVA (2021)



**£18.0m**  
wage equivalent volunteering benefits (2022/23)



**£14.2m**  
economic impact of household spend on creative/cultural activities



**359,380**  
Visits to Hulls Museums and Gallery sites and their large events (2022/23)



**£25.9m**  
wellbeing benefits of cultural activities (2022/23)

Skills pathways need promoting, reviving and devolved funding secured.

The revival of postgraduate creative and cultural subjects is encouraging but the persistent erosion of creative skills pathways nationally below degree level including apprenticeships is a concern and the uptake of music worrying. There is an urgent need to (a) secure devolved funding for applied technical and academic creative disciplines to avoid stagnation or exacerbating the precarious nature of some careers (b) build on international links to support talent retention and attraction and promote tours, trade and cultural collaborations (c) enhance careers awareness, boosting creative aspirations from primary school onwards and (d) widen creative pathways and skills supply through apprenticeships promotion, informal early career mentoring models and technical skills meeting employer needs.



Creative and cultural pathways at level 2 (GCSE) have dropped



**22.2%**  
of GCSE entries are in creative subjects and have dropped by 1% between 2019 and 2022



**0.5%**  
Of all GCSE entries are represented by Music and media/film (2022)



**-5%**  
For entries in Creative A-levels (22.5%-17.5% from 17/18 to 21/22)



**186%**  
Increase in Postgraduate creative pathways between 2019/20 and 2021/22



**45**  
Apprenticeship starts in creative arts and media/comms in 2021/22



**-25.7%**  
Decline in UG and PG music pathways from 2019/20 to 2021/22



**400%**  
Rise in Media/Film PG pathways from 2019/20 to 2021/22

An incredible blend of cultural buildings, assets and organisations

There are over 160 spaces or assets offering activities permanently, temporarily or occasionally. The variety is immense from Grade 1 listed buildings to cutting edge, purpose-built facilities, to meanwhile and temporary facilities to portacabins. Culture permeates almost every category of space. Some assets are as old as the city itself. Others less than a decade. Faith and community organisations probably have the greatest reach. There are cultural hotspots of activity and some areas where choices are more limited and distant. Within 10 minutes' walk of the railway station you can find some of the

most distinctive creative assets in the UK and experience the city's cultural identity and heritage in places like the Fruitmarket, the old town and museum quarter, Ferensway, and HU5. This report looks at the types of culture on offer, proximity to areas of deprivation, accessibility, and heritage as well as energy performance, venue capacity and activities on offer. The database shows that Hull has:

- A distinctive theatre sector with special qualities which includes three exceptional theatres of considerable architectural merit and a handful of uniquely local touring theatre companies.
- A mix of cultural event spaces from stadia and halls to more intimate surroundings with alternative legendary live music venues combined with an inclusive, vibrant and flourishing music scene and distinctive events, festivals and recording studios; many around HU5 and Princes Avenue.
- Become a key filming location using historic buildings and streets for periodic pieces.
- A rich and diverse range of arts organisations, museums, galleries and libraries celebrating local art and maritime heritage, plus a broad mix of formal and contemporary arts organisations as well as five cinemas, four dance studios and other dance class venues.
- Many faith-based organisations (many in deprived areas) such as Hull Minster and their distinctive city choral education strategy. In addition there are over 24 community centres and associations offering cultural and creative activities and events as well as numerous unconventional spaces from hotels to leisure and shopping centres, outdoor spaces and even a community farm.



**200-300**  
Bands representing the city



**Event, creative and production spaces**  
from large-scale concerts to boutique film production studios



**5000**  
Musicians performing across Hull



**High-profile events and festivals**  
Including Freedom Festival, The Sesh, Hull Jazz Festival



**Arts and community-based organisations**  
offering potential for other creative and cultural uses



**Creative digital strengths**  
a growing innovation hub from start-ups, to multinationals



**Unique, historic and maritime assets**  
with niche interests reflecting historic specialisms



**Performance and theatre cluster**  
innovative productions with international ambitions

### Music, TV/film and wider sector engagement, promotion and opportunities

The grass roots music sector is vibrant and inclusive with talented independent artists, record labels and studios and the affordability of the city make it a competitive sector. Collaboration within the music sector could unlock more funding and share skills and networks and more is needed to boost skills and invest in equipment and production space to make it an affordable, attractive career path.

Similarly Hull is an attractive and affordable film location with emerging boutique production companies and informal entry routes and mentoring opportunities which could be expanded. It is important that more of the benefits of larger scale productions are retained through partnership-working and use of local companies and talent and funding is also needed for equipment and space.

Stakeholders described the city's unique creative identity, proudness and individuality. The people are open, forward-looking and ambitious. Hull has global links but a fragmented cultural ecosystem where a lack of resources is stifling collaboration. There could be better engagement and promotion of cultural events and strengths so navigation is easier and substantial opportunities can be realised. The sector is resilient and the range of venues broad. There are opportunities to transform empty buildings, maximise existing spaces and stimulate enterprise/micro clusters and be more climate conscious. The full report and executive summary set out our conclusions on the sector.

## **Acknowledgements**

We would like to thank all those individuals and organisations who freely gave their time to the study. We would particularly like to thank the client team and those who helped us scope-out, prioritise and complete a wide-reaching consultation for the study, this includes the Hull Music Net Team who provided a wealth of insight and early findings from their music survey. It has been a truly collaborative effort. Study consultees included those involved in creative and cultural clusters including musicians, artists, tv/film producers, performers as well as creative businesses, and leads for skills and creative and cultural strategy. They are listed in Annex 1 of the accompanying Technical Annex.

## Executive Summary

This study provides an evidence baseline and economic impact assessment of Hull's creative industries and cultural sector, alongside an asset infrastructure survey to inform Hull City Council's new cultural strategy and ambitions to expand its creative economy. This executive summary highlights the study findings focussing on Hull's creative and cultural strengths and challenges to identify priorities for developing the city's creative businesses, employment, skills and assets.

### Context and Rationale for The Study

In 2021 Hull City Council published its economic strategy for the period 2021-2026<sup>2</sup>. Amongst its key headlines the strategy highlights the City of Culture award in 2017 and identifies Hull as a 'cultural hot spot' with a 'growing cultural sector of nationally recognised talent'. To capitalise on this growth the City Council have begun development of a new cultural strategy and, in July 2023, commissioned Kada Research to conduct a study combining two core strands - an economic impact assessment and infrastructure asset audit of the local creative industries and cultural sector.

The key objectives of the study are to:

1. **Establish a robust economic baseline** of the creative and cultural industries in Hull, including comparators with a focus on music and film/TV production, to help inform future bids and provide a benchmark for future monitoring as part of Hull's new cultural strategy.
2. **Complete a comprehensive impact assessment** of the creative industries and cultural sector on Hull's economy, looking at employment and labour market dynamics.
3. **Undertake a detailed infrastructure mapping exercise** to identify Hull's creative and cultural assets.

The study used a combination of methods involving extensive desk research, in-depth qualitative interviews with creative and cultural practitioners and an online survey to attain a wider reach, an asset infrastructure survey (involving a separate online survey and desk research/telephone contact with asset owners), and a review of economic and wider impacts and performance.

In addition to the development of a new cultural strategy, the City Council is formulating plans to bid for UNESCO City of Music status in 2025 with aspirations to become the fourth UK city to receive this prestigious award. The inclusion of a deep dive into music within the study supports this aspiration.

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<sup>2</sup> Hull City Council, [Hulls Economic Strategy 2021-2026](#), 2021

UNESCO Music Cities have used their status to collaborate with others and develop strategic music projects. In parallel, the study's additional focus on film and TV is in recognition of the city being an emerging filming location and with the Council creating a 'one stop shop' to support filmmaking. The city has hosted the likes of Netflix, ITV and the BBC for high-profile filming in recent years<sup>3</sup>.

### Economic Profile

In terms of employment:

- As of 2021 Hull had an approximately 6,976 working in activities associated with the sector. Real employment has increased by 6.6% (433 employees) in line with the national rise. However there is a low concentration of creative and cultural employment in comparison to national averages.
- Content (media, press, radio & TV) is the largest sub-sector in terms of employment numbers and concentration, constituting 3,180 of the total sectors employment with a concentration 1.23 times the national average. The Originals (creative manufacturing, textiles) and Services (architecture, specialised design) sub-sectors have contracted since 2015.
- The music and film/TV clusters are small. Film/TV has grown, but Music employment is declining.
- Hull ranks 9<sup>th</sup> of the 16 comparator areas for employment concentrations for all creative and cultural sub-sectors, 12<sup>th</sup> for music and 7<sup>th</sup> for film/TV.

In terms of enterprise:

- The number of firms (430) increased slightly (approximately 10 additional firms) between 2015 and 2021. However that is from a low base as the concentration is close to half that of the national average.
- The software sub-sector is Hull's largest for enterprise numbers (145, up 3.6% since 2015) whilst Originals is the largest in relative concentration of firms, 1.05 times the national average (this is perhaps not surprising given the city's creative technology and manufacturing credentials).
- With the exception of the Originals and Content all other creative and cultural sub-sectors have grown in both real and concentration terms since 2015. Despite the contraction, as mentioned, the concentration of Originals firms surpasses the national average.
- The music and film/TV clusters within Hull are small although in film/TV has gained five firms since 2015. Of course these official statistics are quite a blunt instrument and won't pick up all activities in firms working across multiple sectors or the valuable work of freelancers.
- Against other comparator areas for enterprise concentrations Hull ranks 14<sup>th</sup> (of 16) for all creative and cultural sub-sectors, 14<sup>th</sup> for music and 9<sup>th</sup> for film/TV.

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<sup>3</sup> Hull CC News, [Hollywood: Why the film industry has taken a shine to Hull](#), 2021



Looking at occupations:

- Hull has the joint lowest percentage of occupations in the creative and cultural sector (5%) as of 2021, however with the exception of Salford and Newcastle (who lead by this measure by 11% and 10% respectively) no other comparator area has an occupational percentage higher than 9%. The figures are also based on singular year of analysis so will not show any growth from previous years.
- The most common creative and cultural occupation within Hull is 'Programmers and software development professionals' comprising 10% of the sector total (585 people).

With regard to freelancing and self-employment:

- An estimated 32% of the sector is 'hidden' from Standard Industrial Classifications and VAT/PAYE based statistics.
- Accounting for this, Hull's creative and cultural sector would be approximately 2232 employees larger with a further 22 and 69 employees operating in music and film/TV respectively.

### Skills Pathways

Chapter Three assesses the supply of skills within creative and cultural pathways in Hull. It explores the uptake of creative and cultural subjects from Level 2 (GCSE) upwards. It discusses the challenges and opportunities associated with the skills pipeline and pathways into creative and cultural careers in Hull. The headlines are as follows:

- Nationally GCSE entries for all creative subjects combined represent less than a quarter of all subject entries and Hull is just 1 percentage point below this. Creative and cultural pathways at Level 2 (GCSE) have been narrowing marginally at national and local levels and in some subjects – music for instance - national declines have been more acute than others.
- The prioritisation given to STEM subjects and the English Baccalaureate (EBacc) in national policy is suppressing the uptake of arts and the choice and availability of these subject offerings, which is manifesting in declining rates of GCSE entries in creative subjects in Hull
- Creative pathways at L3 (A Level) are declining (and at a faster rate than at L2) in Hull and the comparator areas. Hull's creative A Level entries declined by 5 percentage points (from 22.5% of all entries in 2017/18 to 17.5% in 2021/22). However, postgraduate (PG) creative pathways in Hull are expanding rapidly (by 186%, 2019/20 to 2021/22) despite an undergraduate (UG) decline of 12%.
- UG and PG Music pathways have declined (by 25.7% 2019/20-2021/22) compared to a 400% increase in Media/Film PG, albeit from a low base (of 125 enrolments)
- The recent growth in PG enrolments suggests there are opportunities around higher-level research and potential spin-offs. The city could use this to position itself at the forefront of creative research and development and the development of clearer routeways into local creative careers
- Apprenticeship pathways are small with just 45 starts in creative arts and media/comms in 2021/22 in Hull, though creative arts starts have increased since 2020/21 (potentially indicating Covid-19

pandemic impacts). That said Hull has a substantial further education sector which includes high quality creative programmes and pathways such as music, fine art, performing arts, fashion and textiles and graphic design.

- The national agenda for promoting technical skills as a lever for meeting employer needs presents opportunities for building on local strengths in creative arts amongst Hull's further and higher education providers. Promoting apprenticeship and mentoring models (e.g. by exploring options for levy transfer to remove barriers to engagement amongst SMEs relating to costs and capacity) could offer new pathways into creative arts employment, particularly for those with talent or potential but without formal qualifications
- Current perceptions and lived experiences of operating in creative and cultural sectors highlight the precarious nature of careers, particularly in music. While there is a vibrant, grass-roots music scene with a buoyant supply of home-grown talent, the reality of trying to carve out a longer-term career in music is challenging. Local musicians and producers have reported difficulties in earning a living from music and as a result this is often pursued as a hobby alongside other paid employment and in, some instances, this may be serving as a push factor for talent leaving Hull.
- Efforts to raise aspiration and understanding about creative careers from as early as possible amongst young people and their parents/carers (from Primary stage) need to be matched by clear pathways underpinned by formal employment and better paid jobs.

## Economic Impact

Chapter four assess the economic impact and wider quantitative characteristics of creative industries and cultural sectors in Hull. An analysis of value of the sector was undertaken (Gross Value Added, GVA) and wider impacts using Treasury Green Book principles.

The economic headlines are as follows:

- Taking into account direct, indirect and induced benefits the total value of the sector is £0.46bn, comprised of:
  - Direct total sector GVA for creative industries and the cultural sector is £224.8m (2021) which increased by 20% between 2015 and 2021
  - Indirect total sector GVA for creative industries and the cultural sector is £78.7m (2021) accounting for jobs operating in other sectors providing services to those directly employed in the sector, such as production of goods used by directly creative jobs
  - Induced GVA for creative industries and the cultural sector is £157.4m (2021) accounting for supply chain impacts across the wider economy and consumers spending by directly creative roles.

The wider benefits (2022/23) are as follows:

- Residential spend on creative and cultural events/activities is estimated at £14.2m
- Volunteering activity in the sectors represents a wage equivalent impact of £18.0m

- The wellbeing benefits of volunteers in creative industries and cultural sector equates to £2.7m
- Total wellbeing impact is estimated at £25.9m for those participating in creative/cultural activities.



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Creative and Cultural  
Sector GVA (2021)  
+20.0% from 2015



**£37,443**  
Creative and Cultural  
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**£2.6m**  
Music Sector GVA  
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**£12.3m**  
Film and TV Sector  
GVA (2021)



**£18.0m**  
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**£14.2m**  
economic impact of  
household spend  
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activities



**359,380**  
Visits to Hulls Museums  
and Gallery sites and their  
large events (2022/23)



**£25.9m**  
wellbeing benefits  
of cultural activities  
(2022/23)

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## Stakeholder Insights

Through a combination of one-to-one interviews and an online survey 43 stakeholders were engaged and provided rich and valuable insight into Hull's creative industries and cultural sector including strengths, challenges and opportunities for the overall ecosystem, asset infrastructure, music, film and TV and the local skills pipeline.

<sup>4</sup> The figure for visit to Hulls Museums and Gallery sites and Large events (359,380) relates to annual attendance at Hulls museums and Ferens art Gallery as cited in the [Hull Museums and Gallery Annual Summary 22/23](#) and attendance at the 'Magic of Christmas' and 'Medieval Mayhem' events. Not all the city's cultural events have been considered as this study was focused on cultural infrastructure primarily.




## Hull's Creative and Cultural Ecosystem and Asset Infrastructure

### Stakeholder Insight Key Themes

	STRENGTHS	CHALLENGES	OPPORTUNITIES
 <p><b>Creative and Cultural Ecosystem</b></p>	<ul style="list-style-type: none"> <li>• Uniqueness and a proud sense of individuality</li> <li>• Openness of the people of Hull</li> <li>• International interests and links</li> <li>• Forward looking and ambitious</li> </ul>	<ul style="list-style-type: none"> <li>• Communications and profile</li> <li>• Fragmentation within and across the ecosystem</li> <li>• Lack of funding constrains collaboration</li> <li>• Concerns that growth threatens Hull's unique culture</li> </ul>	<ul style="list-style-type: none"> <li>• Clarifying the ecosystem identity and promoting its strengths within and beyond Hull</li> <li>• Foster engagement across all parts of the city</li> </ul>
 <p><b>Creative and Cultural Asset Infrastructure</b></p>	<ul style="list-style-type: none"> <li>• Multiple venue sizes</li> <li>• Unused buildings of historical and cultural interest</li> <li>• Location affordability offering unique maritime heritage interests and links</li> </ul>	<ul style="list-style-type: none"> <li>• Resilience and silo working</li> <li>• Navigating as a newcomer</li> <li>• Affordability of larger venues</li> </ul>	<ul style="list-style-type: none"> <li>• Spreading across the city</li> <li>• Transforming empty buildings, maximising existing spaces</li> <li>• Using assets to stimulate entrepreneurialism and micro-cluster development</li> <li>• Promoting collaboration</li> <li>• Becoming more climate conscious</li> </ul>

## Hull Music, Film/TV and Skills Pipeline Deep Dive

### Stakeholder Insight

	STRENGTHS	CHALLENGES	OPPORTUNITIES
 <p><b>Music deep dive</b></p>	<ul style="list-style-type: none"> <li>• Grass-roots and inclusive music scene</li> <li>• Vibrant, independent artists and record labels</li> <li>• Affordability of Hull as a city to create</li> </ul>	<ul style="list-style-type: none"> <li>• A lack of skilled professionals is holding the music industry back</li> <li>• Access to funding for equipment, production space creates a ceiling for new talent</li> <li>• Affordability to advance and develop a career in music</li> </ul>	<ul style="list-style-type: none"> <li>• Collaboration to share skill and networks</li> <li>• Communications and mentoring to unlock access to funding and 'big breaks'</li> </ul>
 <p><b>Film/TV deep dive</b></p>	<ul style="list-style-type: none"> <li>• Attractiveness and affordability as a filming location</li> <li>• Emerging boutique production companies</li> <li>• Informal entry routes and pathways are inclusive with a willingness to provide mentorship</li> </ul>	<ul style="list-style-type: none"> <li>• Retaining the benefits of large-scale filming</li> <li>• Capacity within the micro-cluster for attracting, retaining and nurturing talent is limited</li> <li>• Access to funding for equipment and shared space for new talent</li> </ul>	<ul style="list-style-type: none"> <li>• Partnership working with large-scale production companies to create a more sustainable local filming model using local companies/talent</li> <li>• Expanding mentoring/ apprenticeship routes into film/TV</li> </ul>
 <p><b>Skills pipeline</b></p>	<ul style="list-style-type: none"> <li>• Sector-leading models for young people and inclusivity including an Arts Council NPO</li> </ul>	<ul style="list-style-type: none"> <li>• Nurturing new talent into sustainable pathways</li> <li>• Retaining and attracting talent</li> </ul>	<ul style="list-style-type: none"> <li>• Harnessing local good practice, expertise and networks to expand and retain talent supply</li> <li>• Creating more stable career and progression pathways</li> </ul>

Key themes identified from the qualitative data gathered are summarised in the previous two diagrams. The first shows there is scope to promote its unique identity, international interests and forward-looking ambitions. Stimulating collaboration will help to strengthen the ecosystem and by fostering engagement new opportunities will be unlocked.

The city's creative and cultural assets and maritime heritage offers an affordable and attractive filming and creative location but there is further potential to maximise existing and empty spaces to foster entrepreneurialism and new activities. Better partnership working would ensure its creative spaces are better used (in all of Hull's communities) and could be fine-tuned to better support new-comers and emerging talent wishing to progress and formalise their creative careers.

#### Headlines from the analysis of creative and cultural spaces and places (the asset audit)

With over 160 spaces or assets that offer creative or cultural activities permanently or temporarily / occasionally this study (chapter 6) has identified an incredible blend of buildings and organisations across the whole city. The variety is immense from Grade 1 listed buildings to cutting edge, purpose-built facilities to meanwhile and temporary facilities to portacabins. Culture permeates almost every category of space within the city. Some of the city's assets are as old as the city itself, over 700 years, others less than a decade. Faith and community organisations probably have the greatest reach across the city.

The analysis in chapter 6 shows that there are cultural hotspots of activity and some areas where culture choices are more limited and simply further away. Within 10 minutes' walk from the railway station you can find some of the most distinctive creative assets in the UK in places like the Fruitmarket, the old town and museum quarter, Ferensway, and HU5. In these places you can experience the city's cultural identity and heritage. Of Hull's creative and cultural assets, 25% are within a 15-minute walk from the train station. Chapter 6 looks at the types of culture on offer, proximity to areas of deprivation, accessibility, and heritage (using listed assets as a proxy). Many other building characteristics are explored from energy performance to venue capacity and facilities and activities on offer.

The creative database indicates that Hull has a distinctive theatre sector with special qualities which includes three exceptional theatres of considerable architectural merit including the public facing Hull New Theatre and Hull Truck theatre and the youth focused Gulbenkian Centre. There are also a handful of uniquely local touring theatre companies including Middle Child, the Roaring Girls, the Herd, Indigo Moon Theatre and Silent Uproar. Middle Child also have a space to support theatre development and production.

Hull has a range of cultural event spaces and assets from Connexin Live to the KC Stadium, Hull City Hall and Hull New Theatre to more intimate surroundings with alternative legendary live music venues like the New Adelphi Club, the Welly, the Social and the Polar Bear. Hull has an inclusive, vibrant and flourishing music scene and high-profile range of distinctive events, festivals and many recording studios. Many of the music venues are clustered around the HU5 postcode and the popular Princes Avenue in north-west Hull.

Hull has become a key filming location over the last decade, in part thanks to its historic buildings and streets making it a prime location for periodic pieces. Hull has hosted the filming of the star-studded *Enola Holmes 2*, the 2018 global hit TV show 'Victoria'; starring Jenna Coleman; and the Channel 4 drama 'National Treasure' with the late Robbie Coltrane and Julie Walters that used the Guildhall building to double as London's legal district. The city has a number of well-known and successful Film/TV and video production assets that have contributed to its turnaround, including Astor Film Productions, Northern Films/InterTech media and Nova Studios.

The research identified a rich and diverse range of arts organisations, museums, galleries and libraries celebrating the art and maritime heritage of Hull and East Yorkshire. The museum quarter in HU1 comprises a number of attractions just off the old town and the city has 12 libraries hosting a variety of cultural workshops and events throughout the year, for all ages and interests.

There is a broad mix of formal and contemporary arts organisations and galleries plus many organisations working in the sector as well as five cinemas. There are many faith-based organisations that offer creative and cultural activities which prioritise reaching deprived communities. Dance is very popular and there are four dedicated dance studios and multiple community organisations offering dance classes. Over 24 community centres, associations and spaces were recorded in the asset survey offering cultural and creative activities. These cover HU1-HU7 postcodes and are also located in the most deprived wards.

There are numerous spaces across the city as suspected that are used for cultural and creative events and activities including hotels, leisure and shopping centres, outdoor spaces and even a community farm.

## In Conclusion

Hull City Council and its partners may wish to consider the following when developing the new cultural strategy and bidding for new programmes.

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### Strengthening Employment and Entrepreneurship

- While Hull's grass-roots music cluster is anecdotally considered strong, it is largely hidden in the somewhat blunt business and employment statistics. There is a desire from those involved to elevate its profile to create sustained career opportunities to retain and attract talent. Making it easy to promote collaborative performances, events and inter/intra-sector partnerships will also help the music cluster to be less commercially fragile.
- Hull has a niche film/TV production micro-cluster with examples of successful growing start-ups. Identifying supply chain opportunities to transfer the benefits of Hull being a popular filming location to local businesses/people would stimulate new enterprise and scale-up activity.
- Building on and sharing good practice from the local digital and tech companies could help new and existing business to adopt new technologies (many premises do have automated booking systems). The new DCMS creative growth award will bring new investment to the sector.

- Hull has some strong anchor organisations/businesses in the creative and cultural ecosystem. Raising their profile and promoting awareness amongst new entrants could further stimulate home-grown talent and attract talent from elsewhere.
- Designated premises managers' expertise, facilities management and hospitality skills and personnel are integral to the sector in addition to creative positions.
- Continuing to exploit and celebrate Hull's identity is key to promoting Hull's creative and cultural strengths to make the city an attractive proposition for creative artists and businesses. How strong and complete is the offer for creative talent and how is this best achieved?

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#### Boosting Hull's Skills Supply and Broadening Pathways into The Ecosystem

- A pattern of declining GCSE and A Level subject entries are narrowing the pathways into and progression towards creative and cultural higher-level study and careers.
- The potential benefits presented by the growth in postgraduate research could be maximised for innovation and further development of the sector while boosting higher level skills supply.
- Awareness of creative/cultural careers is variable with scope to clarify pathways into sustained employment. Raising awareness from primary school stage (amongst parents/carers too) offers the potential to boost aspirations for widening creative pathways and local skills supply.
- Informal apprenticeship/mentoring models work well in Hull's creative businesses. Stakeholders indicate that sharing learning across clusters and micro-clusters e.g. applying youth theatre models to film/TV production, could help to grow and nurture talent.
- Connecting young entrants into music and film/TV to external funding/grants (e.g. for equipment) and shared spaces could reduce barriers into formal career pathways.
- Hull's international links provide opportunities for profile raising to support talent retention and attraction and to promote tours, trade and cultural collaborations.
- The revival of postgraduate creative and cultural subjects is encouraging but the persistent erosion of creative skills pathways nationally below degree level including apprenticeships is a concern and the uptake of music worrying. There is an urgent need to secure devolved funding for applied technical and academic disciplines in the sector to ensure it does not stagnate.

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#### Maximising Hull's Asset Infrastructure and Promoting Collaboration

- Financial barriers compounded by existing pricing models/costs (particularly for larger venues) create challenges for community groups and events in accessing these assets for the wider benefit of Hull's communities. Income generation is one of the biggest challenges for the sector.
- Collaboration between and within creative clusters and micro-clusters in Hull would strengthen the ecosystem and open-up access to available assets and events. This includes music producers and musicians specifically and perhaps cinemas, a wide variety of community dance of all forms and/or galleries. Music survey respondents want to learn more about music within other industries (41%) and make contacts and build relationships (39%). Could informal networks be nurtured?

- The city has several examples of good practice (e.g. Back to Ours, NAPA, State of the Arts Academy, Hull Truck and the Warren) that could deepen community engagement and innovative delivery including in harder to reach areas and communities. How might community and faith organisations be better supported to offer cultural experiences/activities in cultural 'cold spots'?
- There is an opportunity to deepen the links between culture and heritage by enhancing peoples' perceptions and experience of the city and securing new place-based investment.
- Many assets have a poor energy rating so some targeted advice on energy efficiency and carbon reduction might be well-received especially if it results in cost savings.
- Hull currently fails to sufficiently promote its existing strengths and distinctive features to both its residents and those further afield with stakeholders suggesting that communications and profile raising could help to position the city more as a national and international creative and cultural player. Awareness of event listings and scheduling across organisations could be enhanced. New technologies could be used to enhance marketing and local and regional audience development.





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