KADA

A Creative and Cultural Economic Impact Assessment and Asset Infrastructure Audit

Management Summary
for Hull City Council,
December 2023

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.

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.

Hull has almost 7,000 people working in the cultural and creative sector. [1]

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.

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.

[1] 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.

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.

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