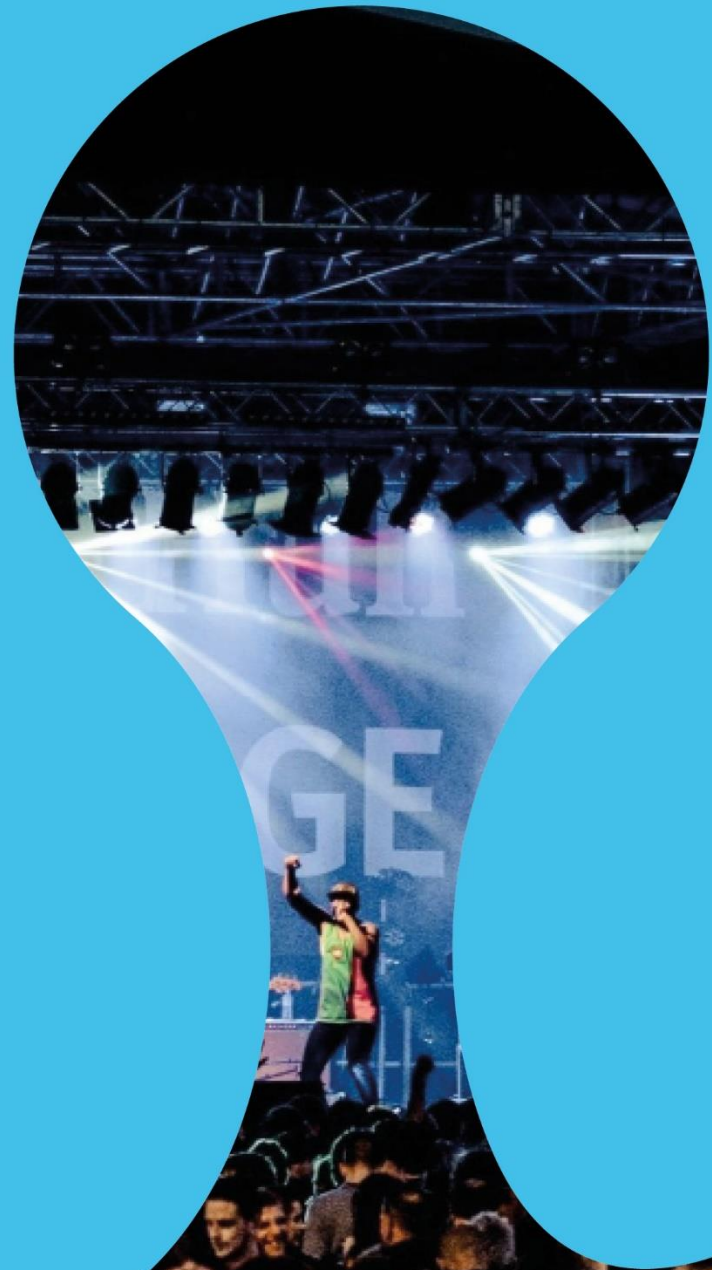




**A Creative and  
Cultural Economic  
Impact Assessment  
and Asset  
Infrastructure Audit**

**A Final Report**  
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.



**£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.

## **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.



**£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)

4



## 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.

# 1 Introduction and Study Overview

This research project by Kada Research assesses the creative and cultural ecosystem within Hull. It involved an assessment of the sector's impact and an audit of creative and cultural spaces (or assets). This first chapter sets the scene introducing the study aims, objectives and approach. We describe this unique and distinctive sector in section 1.3 and talk about the wider policy backdrop.

## 1.1 Study Scope

### Background

In 2021 Hull City Council published its economic strategy for the period 2021-2026<sup>5</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 an impact assessment and infrastructure asset audit of the creative and cultural ecosystem.

The study brings together two project strands with a combined methodology intended to support and inform Hull City Council's new cultural strategy; these are:

- An economic impact review of Hull's creative industries and cultural sector, focusing specifically on music and film and TV production. The aim of this strand is to i) provide an understanding of the creative and cultural ecosystem capturing the number of people working within the city's creative industries and cultural sector directly and indirectly, ii) assess the sector's reach through festivals and other events and iii) review current operating creative firms and their characteristics
- A creative and cultural assets infrastructure audit to provide an overview of current infrastructure; an understanding of opportunities and challenges for the city's creative and cultural infrastructure and a review of how effectively it is currently performing.

In addition to the development of a cultural strategy, Hull 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. In support of this aspiration, both project strands include a specific focus on the music sector. UNESCO Music Cities have used their status to collaborate with others and develop strategic music projects. In parallel, specific focus is also attributed to Hull's film and TV offering within the analysis and impact modelling. This is in recognition of the city being an emergent TV and filming

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<sup>5</sup> Hull City Council, [Hulls Economic Strategy 2021-2026](#), 2021

location with the Council creating a 'one stop shop' to support filmmaking. The city has hosted the likes of Netflix, ITV and the BBC in recent years<sup>6</sup>.

## Objectives

The key objectives of the study, which are framed by the two project strands set out above, are to:

1. Establish a robust economic baseline of the creative and cultural ecosystem<sup>7</sup> in Hull, including comparators, to help inform planned bid development and provide a benchmark for future monitoring as part of the City Council's cultural strategy development. The baseline captures all creative and cultural clusters with a specific focus on music and film/TV production.
2. Complete a comprehensive impact assessment of the creative industries and cultural sector on Hull's economy, with consideration to employment and labour market variables.
3. Undertake a detailed infrastructure mapping exercise to identify Hull's creative and cultural assets.

## 1.2 Study Approach

The study method was organised around five key stages (work packages) as follows:



Initially we undertook scoping discussions with seven key contacts identified by the city council (see technical annex). They gave us some fantastic insights into Hull's cultural and creative industries which helped to identify themes to explore further. They also provided us with new stakeholder contacts to engage and listed cultural and creative venues (assets) they were aware of – large and small.

The team undertook a detailed desk review of the cultural industries landscape to set the scene and confirm the themes and research questions for the wider stakeholder engagement activities. We took some time agreeing a definition for the creative industries sector (see technical annex) so that official statistics on employment, occupations and enterprise could be collated against agreed, appropriate comparator areas. This analysis appears in chapter two. The team reviewed creative industries skills

<sup>6</sup> Hull CC News, [Hollywood: Why the film industry has taken a shine to Hull](#), 2021

<sup>7</sup> Creative and cultural ecosystem is used to refer to the creative industries and cultural sector, reflecting the broader reach of creative and cultural activities and inter-connected clusters and micro-clusters.

supply data which informed a mapping exercise of the career pathways and assessment of provision (strengths and gaps) which appears in chapter three.

Collating the asset database was a challenging task involving a combination of an online survey for facility managers, venue lists, stakeholder insights, a manual online desk review and intelligence from a range of sources (lists of libraries and community venues for example). We identified obvious candidates (theatres, music venues, etc) as well as spaces where the hosting of events was not the primary purpose, for example, restaurants, hotels, stadiums, etc (the latter was more time consuming). We endeavoured to capture as much detail as possible, but this was not always straightforward. The output from this stage was a database of Hull's cultural and creative assets including data (where known) on audience capacity, energy efficiency, employee and turnover figures and performance frequency and charges. Analysis of Hull's infrastructure assets is captured in chapter six.

In tandem to the asset survey (described above) and stakeholder engagement (described below), an assessment of the economic and wider impacts of the sector was undertaken and this is captured in chapter four.

A wider group of stakeholders were engaged through in-depth 1-2-1 interviews (12 in total) organised broadly to follow the creative categories of businesses; music / performance; and education service providers. They were asked about sector strengths, challenges and opportunities, barriers to development, attracting inward investment and skills needs. Additional responses from a wider pool of individuals and organisations were gathered via an online survey which also included music and film/TV related assets (24 responses were received). Emerging findings from the Hull Music Net survey were also captured in the analysis to support the deep dive into Hull's music industry. These insights appear in chapter five.

The report concludes, in chapter seven, with an assessment of the immediate and longer-term issues and opportunities for the sector to ensure it has the capacity to deliver a coherent offer for the city, its residents and visitors. Conclusions about the performance and potential of Hull's creative assets are included at the end of the report to help inform future strategy and bid development within the Council.

### 1.3 Policy Context

#### National

The creative and cultural sector was identified in the Government's 'Build Back Better Plan for Growth'<sup>8</sup> (March 2021), as a priority sector for driving post pandemic recovery. The plan notes that digital and creative sectors are a major UK success story and a critical driver of innovation and growth. Creative clusters can play a critical role in supporting the Government's Levelling Up objectives by driving economic growth and boosting productivity, pay, jobs and living standards across regions. "The creative industries – from film production to video game design – have a critical role to play in levelling up. Not only are they sources of local pride and improved quality of life, but they are also drivers of growth and productivity." (p167)

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<sup>8</sup> HM Treasury, [Build Back Better: Our Plan for Growth](#), 2021

Despite the sector's potential, DCMS rightly noted there are distinct market and information failures that prevent creative businesses scaling and accessing finance outside of London. The creative sector is dominated by SMEs who often lack the capacity and access to expertise on business planning and finance advice (intangible IP can be a barrier), as well as wider support programmes<sup>9</sup>.

The Government's 'Boundless Creativity Report'<sup>10</sup> (2021) highlights the importance of the creative industries sector prior to the pandemic. The findings identify the UK's creatives industries as world leading with a contribution of £115.9bn annually, whilst growing five times the rate of the overall economy. The sector was also estimated to account for 12% of UK services exports at the time. The report outlines the priorities to supporting creative enterprises affected by the pandemic to inform recovery, renewal and future growth. These include reshaping the policy environment to invigorate creative R&D and broadening digital access for producers and consumers.

The Arts Council England produced their 2023-26 Investment Programme<sup>11</sup> and the Let's Create Strategy 2020-2030<sup>12</sup>. The programme (£445m/year) for National Portfolio and Investment Principles Support Organisations is providing an important platform for creative and cultural development, alongside Arts Council open funds programmes. The Let's Create Strategy 2020-2030 sets out an ambitious vision for 2030 where creativity can flourish and everyone in the country has access to a range of high-quality cultural experiences. It aspires to creating an environment in which cultural organisations can more readily change and develop. One of the key outcomes is that cities, towns and villages will thrive through a collaborative culture. It requires organisations seeking investment to align with their four principles that cultural organisations:

- Are ambitious and committed to the quality of their work
- Are dynamic and able to respond to the challenges of the next decade
- Lead the way in their approach to environmental responsibility
- Represent the diversity of this country and work in ways that are valuable to, and valued by, their communities, creative practitioners and partners

Under the UK Government's Creative industries sector vision<sup>13</sup>, £5 million has been invested by DCMS to assist Grassroots Music. As part of this, the Supporting Grassroots Music fund is supporting rehearsal and recording studios, promoters, festivals, and venues for live and electronic music performance.

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## Regional

Priority 1: A Productive & Innovative Economy of the HEY LEP Economic Growth & Workforce Wellbeing Strategy 2021-26<sup>14</sup> aims to "stimulate business growth, increase productivity and employment by developing the ideal conditions in the region for business to start up, innovate, invest, grow and trade". As well as trade and enterprise, one of the key objectives under this Priority is supporting the growth of key sectors. One of the emerging key sectors identified is Digital and Creative. The strategy notes that the sector "is growing in both reputation and in its contribution to the

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<sup>9</sup> Department for Digital Culture Media & Sport, [Create Growth Programme Guidance](#), 2022

<sup>10</sup> Arts and Humanities Research Council & DCMS, [Boundless Creativity report](#), 2021

<sup>11</sup> Arts Council England, [2023-2026 Investment Programme](#), 2023

<sup>12</sup> Arts Council England, [Let's Create Strategy 2020-2030](#), 2020

<sup>13</sup> Department for Culture, Media & Sport, [Creative Industries Sector Vision](#), 2023

<sup>14</sup> Hull and East Yorkshire Local Enterprise Partnership, [Economic Growth & Workforce Wellbeing Strategy 2021-2026](#), 2021

region's economy in both jobs and GVA over the past 10 years" (p34). The sector, it claims, has an important role to play in supporting the adoption of new technology that can lead to productivity improvements in the wider HEY economy whilst making significant contribution to the net zero agenda. HEY LEP plans for growing and developing the creative sectors also closely match the ambitions of the two HEY local authorities.

HEY LEP was successful in October 2023 of the award of £520,000 to deliver a Create Growth Programme (CGP). The CGP will provide 'scale up' support to high-growth potential SMEs from the creative industries and help them grow by becoming more investment ready. In relation to devolution, HEY was named in the Levelling Up White Paper (February 2022) as a fast-track area, and discussions between government and the two HEY local authorities for a Level 3 devolution deal are now progressing at pace. The HEY devolution deal was announced in the Government's autumn statement in late November, with the requisite public consultation taking place in early 2024, followed by the passing of required legislation by late 2024. This would lead to a HEY combined authority being in-situ by the Spring of 2025, with Mayoral elections taking place in May 2025.

The HEY combined authority will have similar economic priorities to HEY LEP; therefore Creative and Digital will remain priority sectors, each receiving special focus in any economic strategies and funding settlements realised. Given current timescales, bespoke support to further scale and develop the creative and digital sectors is likely to come on stream from Spring 2025 – immediately after the end of the CGP funding period.

Visit Hull and East Yorkshire (VHEY) is a business-to-business destination management partnership delivered by the Hull and East Riding Councils who work collaboratively across the visitor economy within the Hull and East Yorkshire area. It is proposing a new and connected business support package and helping the sector offer an aspirational career choice. It will partner with culture, heritage and visitor economy stakeholders to animate, curate and amplify place-based initiatives that inspire visitations and strengthen our sense of local pride and belonging and position Hull and East Yorkshire as a first-choice events destination by attracting, hosting and delivering new events.

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#### Local

Hull City Council's Economic Strategy 2021-26<sup>15</sup> states that Hull is a forward thinking, outward looking maritime city connecting people and businesses with opportunities to achieve prosperity. The city acknowledges that "accelerating existing work and support for the creative, leisure, tourism and hospitality sectors will be a prime focus in the short term to make sure all parts of the economy recover at pace" (p4). In addition it identifies that Hull is a "cultural hot-spot attracting international events working alongside supporting local artistic groups and talent." The strategy notes that a "growing cultural sector of nationally recognised talent has taken their creative excellence to a receptive audience" (p5). As part of this the City Council recognise culture in its broadest sense and that it has an active role in contributing to the city's economic, social and health and wellbeing agendas.

The City Council also recognises the creative sector and specifically music as a key place-based strength of the city; with a multitude of small scale and larger scale venues that support the creative sector and live music; educational opportunities that build cultural and creative skills; with theatres, a city hall, museum, and gallery offer alongside a mid-scale dedicated venue for music. Creative industries are part of Hull's cultural DNA and integral to the city's future. The strategy is built on three

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<sup>15</sup> Hull City Council, [Hulls Economic Strategy 2021-2026](#), 2021

interlinking themes: people, place, and productivity. In terms of place the City of Culture legacy has led to significant investments by both public and private sectors. It has promoted the city centre as a world class visitor destination by changing its focus to an 'experience destination,' bringing together the unique and historic old town and waterfront and creating a thriving cultural and economic hub.

Under the productivity theme there is a commitment to support sectors with emerging innovation and growth potential including the knowledge and digital economy and creative industries (p.18). In advance of a new cultural strategy next year Hull is currently undertaking some detailed work to map the cultural and creative sector and its key assets and to assess the economic impact and contribution of the sector.

Hull's Cultural Strategy for 2016-2026<sup>16</sup> reinforces the belief cited in the City Plan that culture is central to Hull's future as a successful visitor destination. The strategy focuses on developing the city, the audience and the sector as a whole. The strategy expresses the desire to build a base of support for culture as one of its key priorities, referencing the undersized audience particularly for arts within Hull. This runs alongside a requirement for long term change in Hull's audience profile through cultural education. Reference is also made to the need for marketing of the city's cultural strengths and a gap in capacity for this.

Hull's 2017 City of Culture programme boosted the local economy and changed perceptions of the city with "unprecedented levels of coverage for the city and its arts, culture and heritage offer<sup>17</sup>. It brought profound changes to Hull's economy, community and cultural sector and demonstrated what could be achieved. However, the level of cultural sector jobs created fell once the City of Culture year was over and there is a desire in the post COVID years to boost the resilience and scale up potential of creative industries that are or could be 'investment ready.' The city also benefits from exceptional broadband connectivity, strengths in digital skills with a competitive digital offer and a strong pipeline of local talent. This combined with the low cost of living makes Hull an attractive location for creative and cultural firms and provides a strong basis for the sector's continued growth.

Hull's Community Plan (2024-2034) sets out the city's vision for the next decade. The strategy identifies six ambitions informed by resident aspirations including a desire to continue to build Hull's reputation as a leading UK city in community-led culture (young people and intergenerational families) in activity delivery and creation, the collaboration of partners to maximise potential and to utilise existing community assets and neighbourhoods to provide new cultural experiences.

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#### Impacts of COVID-19

It is important to consider the context of the pandemic and its impact on the creative and cultural ecosystem. This report has been undertaken during a period of post pandemic recovery with the cultural and creative sector being among the hardest hit, with large cities often containing the greatest share of jobs at risk<sup>18</sup>.

It is estimated that the cultural and creative sectors lost a total of 10 million jobs worldwide in 2020<sup>19</sup>. Prior to the pandemic, the creative industries were one of the fastest growing parts of the UK

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<sup>16</sup> Hull City Council, [Hull Cultural Strategy 2016-2026](#), 2016

<sup>17</sup> Arts Professional, [City of Culture 'changed Hull's image for the better'](#), 2019

<sup>18</sup> OECD, [Culture shock: COVID-19 and the cultural and creative sectors](#), 2020

<sup>19</sup> WORLD ECONOMIC FORUM, [COVID-19 hit the creative industries particularly hard. How can they be supported in future?](#), 2022



economy<sup>20</sup> and contributed £111.7bn in GVA to the economy, an amount larger than the aerospace, automotive, life sciences and oil and gas sectors combined<sup>21</sup>.

As an industry that is largely dominated by freelance work, the pandemic had detrimental impacts on the lives of many people working in the cultural and creative sectors. In the initial phases of the pandemic, many freelance workers in the cultural and creative sectors were excluded from business support. For those whose businesses relied on public interaction, e.g., concerts, the lack of support available meant that during the pandemic, many businesses and freelancers suffered.

In the later phases of the pandemic recovery methods were implemented to mitigate the impacts on the creative industries. Data from Oxford Economics projects that, with the right investment, the creative sector could recover faster than the UK economy, potentially creating 300,000 new jobs by 2025, bouncing back from the impact of the pandemic<sup>22</sup>.

This report acknowledges the effects of the pandemic and where possible attempted to account for variations in data by analysing data over a timeseries that included both pre and post pandemic years. This report also considers the 'hidden sector' of freelancers, and how COVID impacted those in creative and cultural sectors in Hull.

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<sup>20</sup> GOV.UK, [Boundless Creativity report](#), 2021

<sup>21</sup> Creative Industries Federation, [COVID-19 - Impact, Restart and Recovery](#)

<sup>22</sup> TELEVISUAL, [Report says creative industries can lead post-Covid recovery](#), 2021

## 2 Economic Profile

This chapter provides an economic assessment of Hull's cultural and creative industries. It looks at businesses, employment and occupations. It considers trends over time, the performance of different sub-sectors and compares Hull to some of its peers using both a narrow and broader, agreed definition<sup>23</sup>. Concentrations of activity and the extent of freelancing and self-employment are highlighted. The latter is particularly prevalent, but notoriously hard to quantify precisely.

### 2.1 Employment

The table below shows Hulls employment both in real terms and concentration relative to the National average for the creative and cultural ecosystem.

Total creative and cultural employment has increased by 6.6% (433 employees) from 2015-2021, equal to the National increase. As of 2021 Hull had an approximately 6,976 working in activities associated with the sector. Of these, 3,180 (45.6%) were working in Content (i.e. media, press, radio/TV); a 6.5% rise (195) since 2015. Hull's software sector has experienced the biggest growth, adding a further 1,117 employees (161.7%) since 2015 whilst Originals (i.e. creative manufacturing and textiles) and Services (i.e. architecture and specialised design) have suffered, with losses of over 35% of their employment bases (275 and 622 employees respectively).

Location quotients denote an industries' share of regional/local employment in comparison to its share of national employment, they are a good proxy for concentration<sup>24</sup>. Despite a real increase in employment, Hull's concentration of cultural and creative employment is only 64% of the National average and has experienced only a minor uplift (0.01) since 2015. The content cluster has proportionately more workers than the national average (1.23x), and this has increased since 2015. The only other sub-sector to see an increase in its relative concentration of employment is software which has almost doubled since 2015.

<sup>23</sup> Our approach to defining the sector is described in Annex Two in the Technical Annex

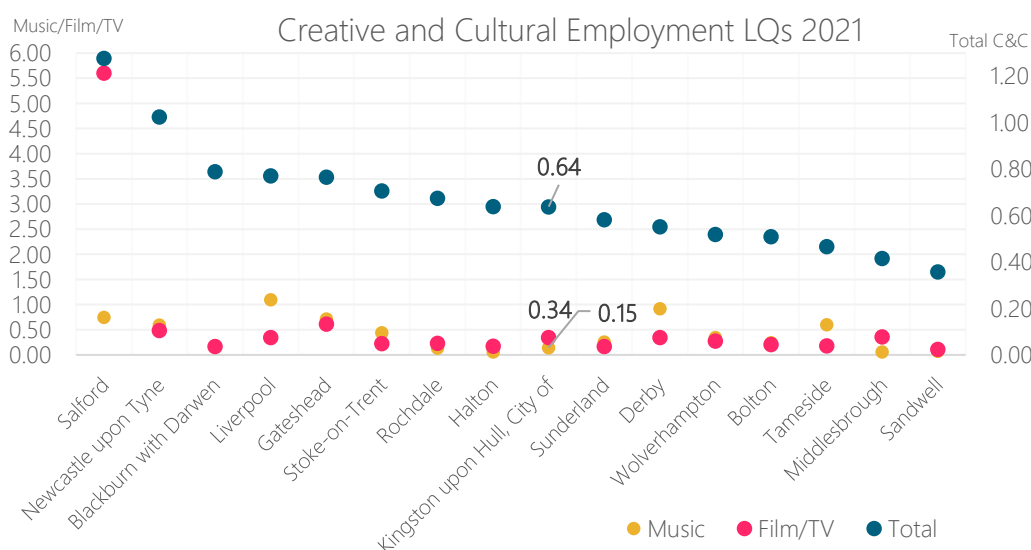
<sup>24</sup> Economic Modelling Specialists, [Understanding Location Quotient](#), 2007

Hull Creative and Cultural Employment LQs				
Sub-Sector	LQ (2015)	LQ (2021)	Employment (2021)	Change (2015-2021)
Content	1.08	1.23	3,180	6.5%
Experiences	0.50	0.50	425	4.7%
Originals	0.80	0.48	415	-39.9%
Services	0.59	0.37	1,150	-35.1%
Software	0.23	0.52	1,807	161.7%
<b>Total</b>	0.63	0.64	6,976	6.6%
Music	0.17	0.15	70	-12.5%
Film/TV	0.26	0.34	215	53.6%

Source: ONS Business Register and Employment Survey 2021<sup>25</sup>

Looking specifically at music and film/TV clusters there is a disparity between the two. Music employment has declined by 12.5% from 2015-2021 (-10 employees) with its relative concentration falling to 0.15 (-0.02) over the same period. In contrast film/TV has grown by 75 employees (53.6%) with its concentration rising by 0.09, although this is still close to a third of the national average.

Hull’s creative and cultural employment concentrations were compared against 15 other areas with similar economic and population demographics (see next table). In 2021 Hull ranked 9<sup>th</sup> for total creative and cultural employment concentration, 12<sup>th</sup> for music and 7<sup>th</sup> for film/TV. Of the 16 local authorities Salford ranked highest for total employment in the sector (1.28 LQ) and for film/TV (5.60 LQ). Liverpool had the highest concentration of music employment relative to the national average (1.10). With the exception of Salford and Newcastle, all comparator areas had employment concentrations below the national average for total creative and cultural employment.



Source: Kada analysis using ONS Business Register and Employment Survey 2021<sup>26</sup>

<sup>25</sup> ONS, [Business Register and Employment Survey](#), 2021

<sup>26</sup> ONS, [Business Register and Employment Survey](#), 2021

## 2.2 Enterprises

As of 2022 Hull had approximately 430 businesses operating in the cultural and creative space, up 2.4% (10) since 2015. This is marginally behind the national rise of 3.6%. Of Hulls firms, the majority (33.7%, 145) were engaged in software related activities, a sub-sector that has increased by 3.6% (5) over the 7-year period. The largest relative growth (50.0%) has been within the Experiences sector (i.e. performing arts and libraries/museums). However this is from a low base as only 20 firms were recorded in 2015. In contrast, while having high levels of employment, the number of content-based firms has seen the largest decline of all cultural and creative sub-sectors (-16.7%, -20 firms).

The concentration of creative and cultural firms is approximately half that of the national average (0.51) and has slightly declined since 2015 (-0.03). Originals is the only sub-sector with a higher concentration than the England average (1.05), however has experienced the largest contraction since 2015 (-0.28).

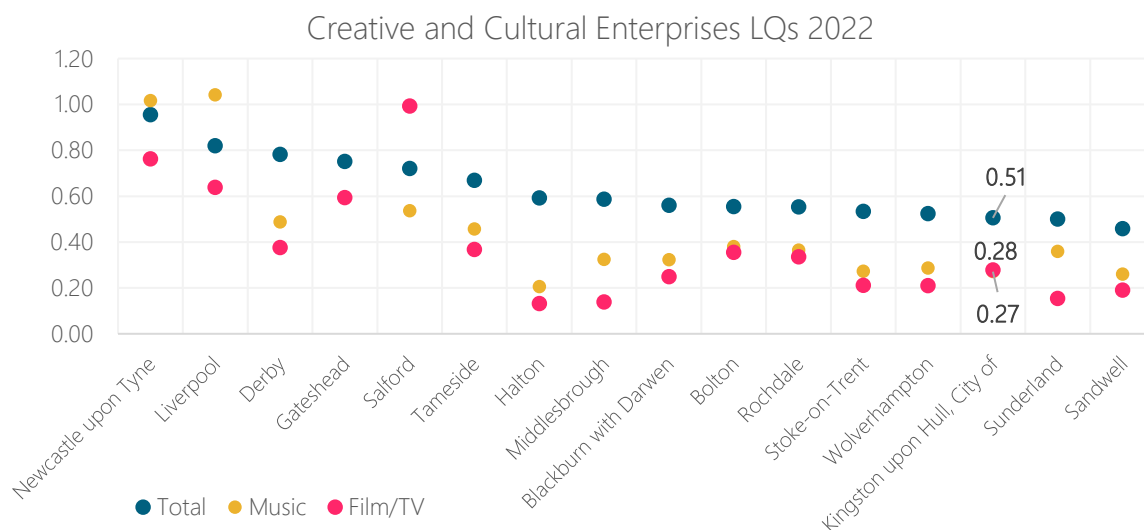
Hull Creative and Cultural Enterprises				
Sub-Sector	LQ (2015)	LQ (2022)	Enterprises (2022)	Change (2015-2022)
Content	0.76	0.54	100	-16.7%
Experiences	0.27	0.37	30	50.0%
Originals	1.33	1.05	50	-9.1%
Services	0.59	0.62	105	23.5%
Software	0.39	0.40	145	3.6%
<b>Total</b>	0.54	0.51	430	2.4%
Music	0.31	0.27	25	0.0%
Film/TV	0.29	0.28	20	33.3%

Source: ONS UK Business Counts 2022<sup>27</sup>

The concentration of film/TV and music firms is generally low with location quotients of 0.28 and 0.27 respectively as of 2022 and this has marginally declined for both since 2015. In real terms, while the number of music firms has been unchanged there has been a slight growth in the film/TV micro cluster with an additional five firms operating since 2015.

Hull performs relatively poorly against its comparators for cultural and creative business concentrations ranking 14<sup>th</sup> out of the 16 local authorities. For music, Hull ranks 14th areas for concentration against the national average (LQ 0.27). Liverpool has the highest concentration to this effect (LQ of 1.04). For film/TV Hull ranks 9th against its comparator areas with Salford recording the highest concentration (0.99) of film/TV enterprises, in line with its large employment figures within this cluster.

<sup>27</sup> ONS, [UK Business Counts](#), 2022



Source: Kada analysis using ONS UK Business Counts 2022<sup>28</sup>

### 2.3 Occupations

Area	Core	Supporting	Total	% in Creative/Cultural
Liverpool	15715	1131	16846	8%
Salford	13230	476	13706	11%
Newcastle upon Tyne	11575	755	12330	10%
Bolton	8660	446	9106	7%
Derby	8220	325	8545	7%
Sandwell	8065	292	8357	6%
Tameside	7760	350	8110	8%
Gateshead	7120	412	7532	9%
Sunderland	6855	523	7378	6%
Wolverhampton	6740	291	7031	6%
Stoke-on-Trent	6740	151	6891	6%
Rochdale	6300	281	6581	7%
<b>Kingston upon Hull, City of</b>	<b>6105</b>	<b>189</b>	<b>6294</b>	<b>5%</b>
Blackburn with Darwen	4230	211	4441	7%
Halton	3815	195	4010	7%
Middlesbrough	2965	127	3092	5%

Source: ONS Employment and Labour Market 2021<sup>29</sup>

<sup>28</sup> ONS, [UK Business Counts, 2022](#)

<sup>29</sup> ONS, [Occupations of those in employment, by local area, working pattern, employment status and disability status, England and Wales, 2021](#)

In addition to SIC code analysis, Standard Occupational Classifications (SOC) were analysed to provide insight into the distribution of creative and cultural roles, based on the ‘snapshot’ from the 2021 census. The SOC is a framework used to classify occupations according to skill level and specialisation. It assigns all jobs a code based on the skills and qualifications needed for the role<sup>30</sup>. This varies from the SIC classification which looks at employment from the enterprise/businesses primary activities. SOC codes allow for a more micro analysis of the level of occupation within a creative industry. As such SIC and SOC figures will have some variation.

As with the SIC analysis a ‘core’ and ‘supporting’ approach was taken with a moderation applied to supporting SOC codes based on the proportion of employment in the ‘core’ creative and cultural sector. The overall figures corroborate the SIC code analysis identifying low numbers of creative and cultural occupations against the comparator local authorities. By occupational count Hull has the joint lowest percentage of all comparator areas (5%) in line with some of the lowest occupational counts. As expected, and mirroring the findings of the SIC code analysis, Salford and Newcastle have the highest proportion of occupations within the creative and cultural sector (11% and 10% respectively).

‘Programmers and software development professionals’ are the most common occupation (585) in Hull comprising one in ten of all creative and cultural employees. This is followed by ‘IT user support technicians’ (370, 6%) and ‘Advertising and marketing associate professionals’ (285, 5%). These top occupations reflect the concentration of software related activities in the city.

SOC Code	Population Estimate	% of Creative/Cultural Employment
Programmers and software development professionals	585	10%
IT user support technicians	370	6%
Advertising and marketing associate professionals	285	5%
Graphic and multimedia designers	260	4%
IT managers	255	4%
CAD, drawing and architectural technicians	210	3%
Telecoms and related network installers and repairers	210	3%
Furniture makers and other craft woodworkers	210	3%
Authors, writers and translators	205	3%
IT operations technicians	200	3%
Communication operators	190	3%
IT business analysts, architects and systems designers	170	3%

Source: ONS Employment and Labour Market 2021<sup>31</sup>

## 2.4 FREELANCERS/SELF-EMPLOYED

Official statistics do not account for the large informal or ‘hidden’ economy made up of occasional creatives, freelancers and the self-employed. Anecdotally, for instance, we know there are 200 to 300 bands operating within Hull, yet these are not visible in official statistics.

<sup>30</sup> Gov.UK, [Understanding UK Occupations](#), 2021

<sup>31</sup> ONS, [Occupations of those in employment, by local area, working pattern, employment status and disability status, England and Wales](#), 2021

*"The city's got a wealth of emerging talent...the music scene is genuinely inclusive, accessible and diverse with venues of all sizes in the city...there's a myriad of venues in the city that provide platforms for grassroots music"(stakeholder survey respondent, 2023).*

As of 2022 there were approximately 1.9 million freelancers in the UK, an increase of 1% since the previous year<sup>32</sup>. Self-employment and freelancer rates are typically higher in creative sectors than in the majority of other sectors across the UK<sup>33</sup>. As of 2021 it was estimated that 32% of the creative industries workforce was self-employed/freelance in comparison to 16% of the UK's workforce<sup>34,35</sup>. This is largely attributable to the unique expertise and freedom they can afford to prospective employers and has cultivated a sense of reliance on non-permanent employees. This flexibility acts also as a barrier to freelancers, whilst freelancing is commonly a choice, the nature of creative and cultural activities and the composition of enterprises engaged in the sector does not often facilitate full-time roles<sup>36</sup>. A recent survey of musicians within Hull undertaken by Hull Music Net found that for 74% of respondents music generates little to no income for them. The survey also indicated that some felt it was impossible to earn a sustainable living by working in the industry alone, and taking other work alongside music-based work is common.

Freelancers and the self-employed are not accounted for in the VAT/PAYE registered figures used in our analysis. Based on the DCMS/CIPEC estimations of creative industries self-employment, 32% of the creative and cultural ecosystem are freelancers/self-employed. Using this as a guideline, Hull's creative and cultural employment would be approximately 2,232 employees larger with an additional 22 working in music and 69 in film/TV. Although the proportion of self-employed/freelancers will vary across the sub-sectors and will likely be higher in areas such as music (due to the nature of work) this should be moderated across the total for the ecosystem as a whole.

Sub-Sector	Employment (2021)	Employment inc. Self-employed/freelancer estimations (2021)	Change
Content	3,180	4198	+1018
Experiences	425	561	+136
Originals	415	548	+133
Services	1,150	1518	+368
Software	1,807	2385	+578
<b>Total</b>	<b>6,976</b>	<b>9208</b>	<b>+2232</b>
Music	70	92	+22
Film/TV	215	284	+69

Source: Kada analysis using ONS Business Register and Employment Survey 2021<sup>37</sup>

<sup>32</sup> Ipse, [The Self-Employed Landscape Report 2022](#), 2022

<sup>33</sup> UK Parliament, [Freelancers in the arts and creative sectors](#), 2023

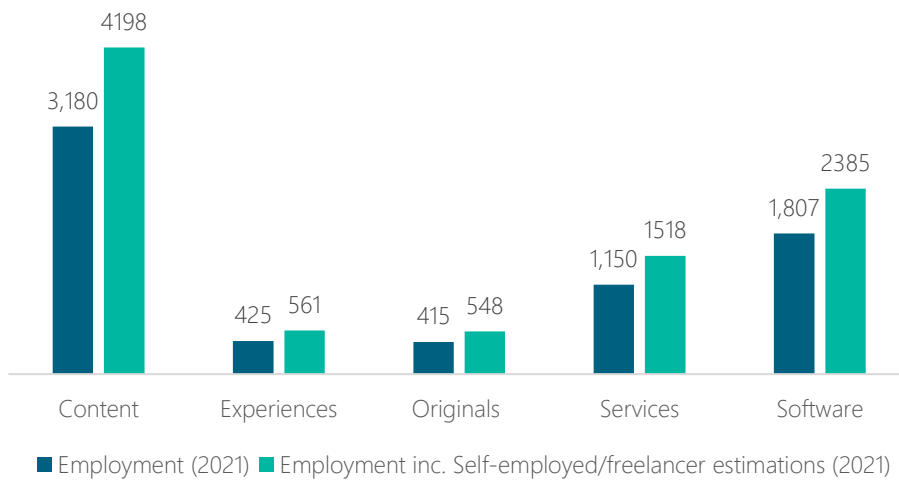
<sup>34</sup> Creative Industries Policy and Evidence Centre, [Freelancers in the creative industries](#), 2021

<sup>35</sup> Department for Digital, Culture, Media & Sport, [DCMS Sector Economic Estimates: Employment Oct 2019 - Sep 2020](#), 2021

<sup>36</sup> Creative Industries Federation, [Creative Freelancers](#), 2017

<sup>37</sup> ONS, [Business Register and Employment Survey](#), 2021

### Creative and Cultural Employment 2021



Source: Kada analysis using ONS Business Register and Employment Survey 2021

The next chapter looks at the supply of skills and pathways into creative and cultural careers.



## 3 Skills Supply and Ecosystem Pathways

This chapter provides an overview of the supply of skills within creative and cultural pathways in Hull. It explores the uptake of creative and cultural subjects from Level 2 (GCSE) through to higher level and beyond to identify the key challenges and opportunities associated with the skills pipeline and pathways into creative and cultural careers in Hull.

### 3.1 Defining Creative and Cultural Subjects

An analysis of Hull's creative and cultural skills pipeline was undertaken by assessing the uptake of creative and cultural subjects from Level 2 onwards. The aim of the analysis was to provide insights into the potential challenges or barriers and opportunities for creative and cultural sectors in relation to skills, progression and career pathways. These findings were also tested and triangulated with themes emerging from the qualitative data gathered via the primary research for the study (the stakeholder interviews and survey).

Creative and cultural subjects were identified at each articulation or progression point to capture uptake at Level 2 (GCSE), Level 3 (A Level) and Level 4+ (undergraduate and postgraduate degree). Where data allowed, the analysis looks at entries and enrolments for creative and cultural subjects combined, including music and film/media subjects, at each progression point in addition to uptake specifically for music and for film/media subjects to support the deep dive into these two areas of focus for the study.

### 3.2 Skills Supply and Early Interest

Early routes into creative and cultural pathways were explored through a review of GCSE/Level 2 and A Level/Level 3 entries by subject across the longest time series possible for each dataset. The bespoke definitions employed for the analysis are included in Technical Annex 2.

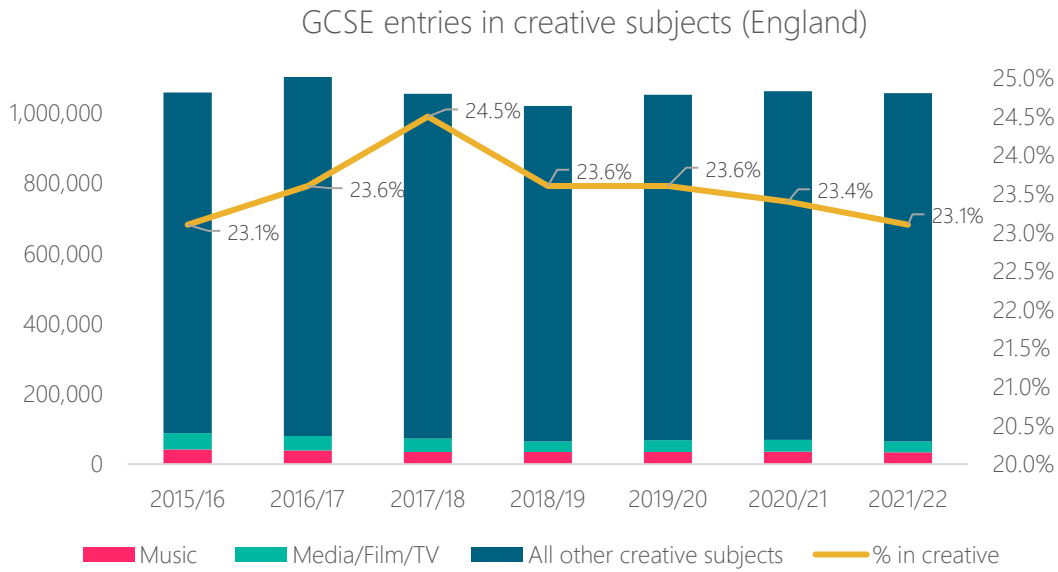
#### Emerging Creative Interests (Level 2 and 3)

Nationally GCSE entries for all creative subjects combined represent less than a quarter of all subject entries (23.1% in 2021/22). In Hull creative subject entries represent a comparable share of all entries though are 1 percentage point below the national level (at 22.2% in 2022) – see following two charts.

Creative and cultural pathways at Level 2 (GCSE) have been narrowing marginally at the national level since 2017/18 (by 1.4 percentage points) and have declined in Hull between 2019 and 2022<sup>38</sup> (by 1 percentage point). In some subjects the declines have been more acute than others<sup>39</sup>.

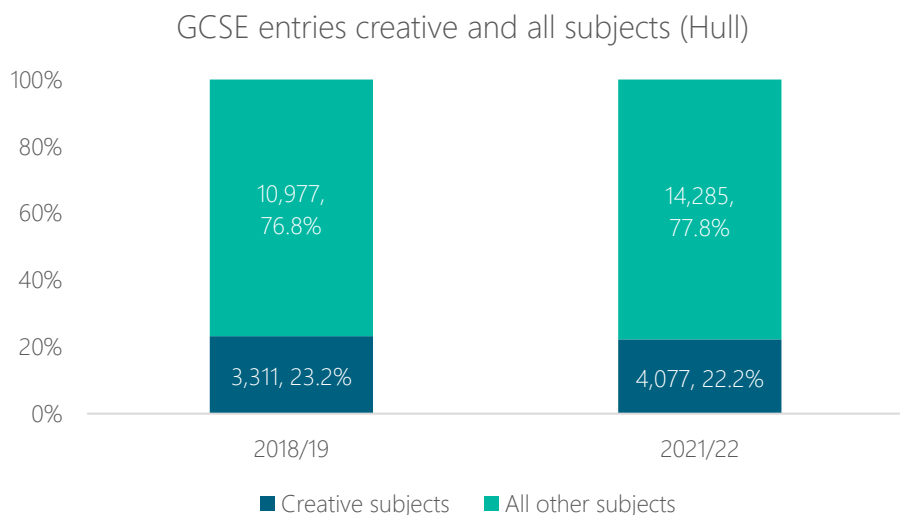
<sup>38</sup> GCSE subject level data was provided directly by schools via Hull City Council and was only available for 2019 and 2022.

<sup>39</sup> The Stage, [GCSE art entries plummet for ninth year in row](#), August 2023.



Source: DfE Explore Statistics

Music and Media/Film GCSE entries combined in Hull represent just 0.7% (2019) and 0.5% (2022). Again, there has been some concern expressed nationally about the perennial decline in uptake of music<sup>40</sup>. This industry has claimed the prioritisation given to STEM subjects and the English Baccalaureate (EBacc) subject requirements in national policy is having a negative impact on the numbers of students choosing to study music or the arts (see Technical Annex 2 for national declines in GCSE music and media/film entries)<sup>41</sup>. These trends are having suppressing effects nationally on the uptake of arts subjects and the choice and availability of these subject offerings and are manifesting at the earliest stage of pathway and subject decision-making amongst young people in Hull. As the following chart shows, all subject entries have increased but creative subjects have grown at a slower rate than other subjects (30% compared to 23%, a difference of 7 percentage points).



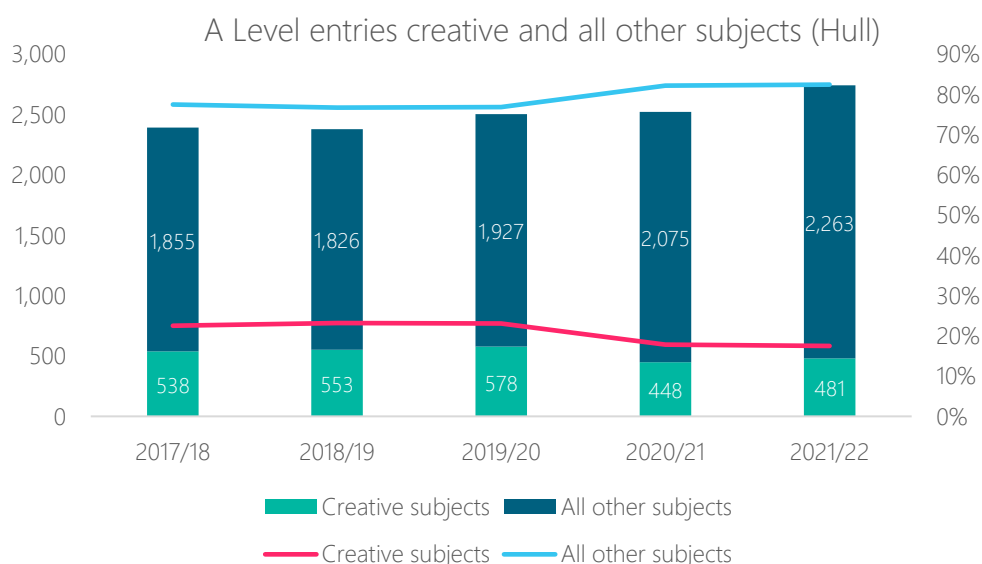
Source: Hull City Council

<sup>40</sup> Classic FM, [GCSE Music exam entries drop by 12.5% since 2022, in decade long decline](#), August 2023.

<sup>41</sup> Music Education Works, [Growing evidence of EBacc's negative impact on Arts GCSEs](#), October 2017.

Music GCSE entries in Hull have only declined by 1 entry between 2018/19 and 2021/22, however numbers are very small (26 in 2018/19 and 27 in 2021/22). Film studies/media combined have seen a larger proportionate decline from 91 in 2018/19 to 62 in 2021/22. Music and film studies/media together have experienced an overall drop of 28 entries (from 117 to 89) within the two-year period (representing a decline of 24%) and this is against a background of the total number of subject entries increasing within the same period (which is in part reflective of cohort population changes).

Creative pathways at L3 (A Level) are also declining (and at a faster rate than at L2) in Hull and the comparator areas (see Technical Annex 2 for comparator analysis for all creative subjects combined). 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). Given the trends in GCSE it is not surprising that creative uptake at A Level has been waning. Birmingham City University note that A Level music entries have been declining for decades and if the trend continues at the same rate, there will not be any more entries for A Level music by 2033<sup>42</sup>.



Looking more specifically at music, the decline in A Level entries between 2017/18 in Hull (of 0.1%, from 0.5% to 0.4%) has been at a slower rate than for the Yorkshire and Humber region and for the majority of the other comparators. However, baseline numbers are extremely small; 12 entries in music in Hull in 2017/18 compared to 11 in 2021/22.

<sup>42</sup> Birmingham City University. Research into [A Level music decline](#).

% of A Level exam entries in Music (as a proportion of all subjects)						
	2017/18	2018/19	2019/20	2020/21	2021/22	Change
Gateshead	0.7%	0.6%	0.9%	0.7%	0.5%	-0.2%
Newcastle	0.7%	0.5%	0.5%	0.5%	0.4%	-0.3%
Hull	0.5%	0.3%	0.4%	0.2%	0.4%	-0.1%
Middlesborough	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%
Sunderland	0.4%	0.2%	0.4%	0.5%	0.2%	-0.2%
Tameside	0.2%	0.2%	0.0%	0.0%	0.0%	-0.2%
Liverpool	0.8%	0.8%	0.7%	1.1%	0.7%	-0.1%
Salford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stoke	0.6%	0.5%	0.6%	0.4%	0.7%	0.1%
Yorkshire & Humber	0.7%	0.5%	0.6%	0.6%	0.5%	-0.2%

Source: DfE Explore Statistics

For media and film studies there has been larger proportionate decline in Hull when compared with music entries; a drop of 2.3% (154 entries in Hull in 2017/18 to 112 in 2021/22). The rate of this decline is larger than the regional average and that for the majority of the comparators. Gateshead is the only comparator area to have experienced an overall increase in media/film entries in the same period (albeit a marginal uplift of 0.3%).

% of A Level exam entries in Media/Film (as a proportion of all subjects)						
	2017/18	2018/19	2019/20	2020/21	2021/22	Change
Gateshead	0.8%	2.2%	2.0%	1.5%	1.1%	0.3%
Newcastle	5.2%	4.4%	3.7%	4.3%	4.1%	-1.1%
Hull	6.4%	5.5%	4.7%	3.7%	4.1%	-2.3%
Middlesborough	4.0%	3.1%	2.8%	2.1%	2.4%	-1.6%
Sunderland	5.0%	4.0%	2.7%	3.7%	3.1%	-1.9%
Tameside	7.2%	4.1%	4.5%	3.0%	4.3%	-2.9%
Liverpool	4.9%	3.6%	4.1%	3.3%	2.8%	-2.1%
Salford	6.0%	3.5%	3.8%	7.4%	5.3%	-0.7%
Stoke	1.9%	1.6%	0.9%	1.5%	1.8%	-0.1%
Yorkshire & Humber	3.1%	2.6%	2.8%	2.2%	2.3%	-0.8%

Source: DfE Explore Statistics

Bringing together the analysis of supply at L2 and L3, a pattern of declining GCSE and A Level creative art entries are having a compounding effect by narrowing the pathways into and progression towards higher-level study and careers in these disciplines from the earliest two stages of young people’s pathway decision-making.

### Technical pathway opportunities

Of note, some of the declines observed for A Level creative arts entries may in part be being driven by the recent diversification of routes available at L3, including vocational qualifications such as BTECs. These routes include creative pathways in music and media alongside more technical and specialist options such as music technology. 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. Providers include the TEC Partnership, with sites in Hull (and Beverley, Bridlington, Grimsby and Scarborough), Wyke College and Wilberforce College. Hull College has two sites and has a well-established art and design, media and music and performing arts curriculum offer providing technical and applied routes from L2 to L7, including Higher Technical Qualifications (HTQs). Despite the national and local declines seen in A Level creative subject uptake the existing strengths in local further education provision offer resilience against these challenges. These strengths could also be mobilised further, and in alignment with the national agenda for boosting technical skills supply across all sectors, to promote greater interest and aspiration amongst young people and their parents/carers/guardians for creative pathways.

Apprenticeships are currently an under-developed route within Hull’s creative and cultural pathways with just 45 starts during 2021/22 in creative and media subjects in Hull. No achievements in crafts, creative arts and design have been recorded between 2019/20 to 2021/22 and achievements have nearly halved in media and communication apprenticeships in the same period. Apprenticeship completions were impacted nationally as a result of the COVID-19 pandemic; however, these impacts will only have exacerbated issues for an already small cohort of creative arts apprenticeships. In Hull and East Yorkshire (HEY) 5,345 starts were recorded for 2021/22 overall, meaning that creative apprenticeships pathways in Hull represent an extremely small proportion of apprenticeship starts in the wider HEY area.<sup>43</sup>

Exploring opportunities offered by apprenticeships, for example levy transfer arrangements which may assist in addressing financial and capacity-related barriers to engagement amongst SMEs could potentially unlock a new pathway into creative and cultural careers. Feedback from stakeholders, particularly in film/TV production, indicated that apprenticeship and mentoring models would work well in creative arts settings given that companies may often be looking to identify talent and potential rather than recruiting specifically on qualifications (see stakeholder insights in Chapter 5). For example, learning from the Youth Theatre models of engagement could also help to nurture film production talent at an earlier stage. Generation Hull, the city’s Local Cultural Education Partnership, will be an important lever for pursuing local apprenticeship opportunities.

Creative Apprenticeships all Levels (Hull)	Achievements			Starts		
	2019/20	2020/21	2021/22	2019/20	2020/21	2021/22
Crafts, Creative Arts and Design	0	0	0	7	6	21
Media and Communication	16	12	9	24	15	24

Source: ESFA Data Cube (extracted September 2023)

### Higher Level Skills Pathways and Inspirational Assets

Against the trends at L2 and L3, 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

<sup>43</sup> See HEY LEP [Digital Skills Analysis Update](#) (July 2023). Direct HEY comparisons cannot be made between this dataset and the data shown specifically for Hull’s creative apprenticeship pathways as they were extracted from Data Cube during different time periods and for different geographies. Data Cube licensing parameters limited the data that could be reported on specifically for Hull.

have declined (by 25.7% 2019/20-2021/22) compared to a 400% increase in Media/Film PG, albeit from a low base (125 enrolments).

All Creative/Cultural HE Enrolments (Hull)	2019/20	2020/21	2021/22	Change	% Change
All	1,880	1,965	2,230	350	18.6%
Postgraduate (PG)	295	430	845	550	186.4%
Undergraduate (UG)	1,580	1,540	1,385	-195	-12.3%

Source: HESA higher education enrolments by discipline

The University’s well-established School of the Arts within the Faculty of Arts, Culture and Education has been exploring routes into the film and screen industries in a project funded by the Screen Industries Growth Network. It explored assumptions and expectations amongst young learners, education providers and industry organisations about the creative industries. It identified that there are not enough opportunities for young learners in new and growing businesses in the sector. This, combined with growth in PG enrolments, suggests there are opportunities to maximise around R&D and potential spin-offs so that the city can position itself at the forefront of sectoral developments alongside establishing clearer routeways into local creative arts careers.

Hull’s assets are providing diverse and varied educational and training opportunities for nurturing talent, providing industry-standard facilities and experiences to help raise aspirations for creative pathways. The University of Hull offers pathways in drama, film and media, games and graphic design and music, supported by high-quality facilities at Middleton Hall, a flexible 406-seater auditorium for hosting theatre productions, music events and conferences (see Chapter 6). The Northern Academy of Performing Arts (NAPA), an arts charity located in the city’s 1904 Arts School (with a 125-seat theatre) partners with Wilberforce College and UAL to offer a Level 3 Arts course. NAPA delivers other inclusive training opportunities in Hull and East Riding as does the State of the Arts Academy in Hull, and Hymers College, an independent school in the city, has a 200-seater theatre. Hull Music Service based out of the Albemarle Music Centre delivers a £1.7m traded business with schools and colleges, supporting over 5000 young people across the city (one of the largest single income streams into Hulls creative industry).

### Career Pathways, Re-Skilling and Up-Skilling

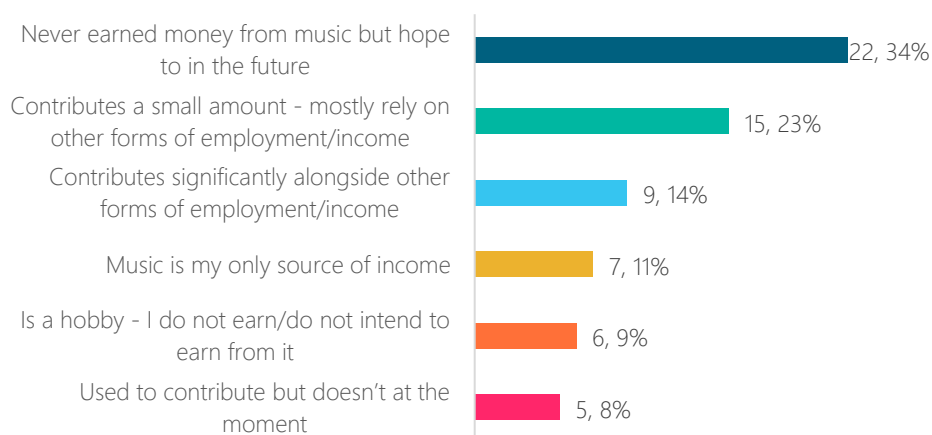
Creative CPD and upskilling/re-skilling options for adults are currently limited due to demand and funding availability, as reported by stakeholders involved in adult education within the city. Data summarising Adult Education Budget (AEB) target enrolments and achievements by sector subject area corroborates these perspectives (see Technical Annex 2). While publicly available AEB target data has its limitations, due to timings of data capture and suppression of low numbers, it provides insight into the relative proportion of provision in creative subject areas. Currently, approximately 2% (80) of AEB target enrolments are in arts, media and publishing, representing a minimal portion of adult education provision in Hull. Devolution of the AEB and alignment with local programmes being developed, for example under the UKPSF ‘people and skills’ themed priority, may prove fruitful for scoping out routes into creative arts for adults who are looking to re-skill, up-skill or (re)enter the labour market.

Any steps taken to expand uptake of creative subjects and any aspiration raising activity for young people and their families would need to be matched by sustainable, secure career progression pathways in Hull’s creative and cultural industries. Drawing on the stakeholder insights in Chapter 5 current perceptions and lived experiences of operating in these sectors highlight the precarious nature of careers, particularly in music. For example, and as noted in Chapter 2, early findings from the Hull Music Net-led music survey and stakeholders responding to the Kada survey indicate that while there is a vibrant, grass-roots music scene in Hull with a buoyant supply of home-grown talent, the reality of trying to carve out a career in music is challenging and over a third of musicians responding to the Hull Music Net survey to date are not satisfied with their income generation from music (see following chart and Technical Annex 2).

Musicians and music producers have reported the 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:

*“But in Hull, it’s a desert land, really in terms of those paying routes for adults, because there isn’t a lot of employment, you know, in those areas coming through. So young people often don’t aspire to that, and they are going to move out into the industry in Leeds, Sheffield, London, etc”.*

### Contribution of Music to income



Source: Hull Music Net Survey, initial responses October 2023

### Looking to the Future

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.

Whichever government is next in power, the nature of the supply of skills for creative industries is likely to change. For instance, the Labour party manifesto pledges to ensure the creative economy is open to everyone by breaking down barriers to opportunity and unlocking talent by offering flexible skills and training opportunities<sup>44</sup>. They have promised a landmark shift in skills provision including accelerated devolution powers via a new body, Skills England. The current Conservative government

<sup>44</sup> Labour List, [Labour Manifesto](#), May 2023.

has made a pledge to replace A Levels and T Levels with the "Advanced British Standard". This new qualification would mark a significant shift in unifying academic and technical education.



## 4 Economic Impact

This chapter provides insights into the current economic impact of creative industries and cultural sector in Hull including for economic Gross Value Added (GVA) impacts and wider benefits (household spend, volunteer benefits and total sector wellbeing benefits).

### 4.1 Approach To Assessing Impact

The approaches to each area of impact are outlined below.

#### GVA

To assess the economic value of the creative sector, regional GVA data by industry at ITL3 levels was sourced<sup>45</sup> by 2-digit SIC code. Music sector GVA and film/TV sector GVA have also been defined using official classifications (so called 2-digit Standard Industrial Classification (SIC)) codes at a regional level. For GVA per employee, employment data was sourced using more fine grained 4-digit SIC codes<sup>46,47</sup>. Total sector GVA, music sector GVA and film/TV sector GVA were for 2015 and 2021 (see table). The creative industries and cultural sector GVA has increased by a fifth (20.0%) since 2015 and per head by 11.9%. Music GVA has declined (-2.1%) whilst GVA per head is increased (11.9%), most likely as a result of a decline in employment. Conversely, film/TV GVA increase by 24.3% though GVA per head fell by 19.0%, most likely attributable to a rise in employment with slightly diminished productivity.

	<b>Creative and Cultural Sector GVA</b> <i>Kingston upon Hull, City of</i>	<b>2015</b> £187,419,355	<b>2021</b> £224,845,996	<b>Change</b> £37,426,642	<b>% Change</b> 20.0%
	<b>Creative and Cultural Sector GVA per employee</b> <i>Kingston upon Hull, City of</i>	<b>2015</b> £33,468	<b>2021</b> £37,443	<b>Change</b> £3,975	<b>% Change</b> 11.9%
	<b>Music Sector GVA</b> <i>Kingston upon Hull, City of</i>	<b>2015</b> £2,677,419	<b>2021</b> £2,621,019	<b>Change</b> -£56,400	<b>% Change</b> -2.1%
	<b>Music Sector GVA per employee</b> <i>Kingston upon Hull, City of</i>	<b>2015</b> £33,468	<b>2021</b> £37,443	<b>Change</b> £3,975	<b>% Change</b> 11.9%
	<b>Film/TV Sector GVA</b> <i>Kingston upon Hull, City of</i>	<b>2015</b> £9,882,353	<b>2021</b> £12,285,714	<b>Change</b> £2,403,361	<b>% Change</b> 24.3%
	<b>Film/TV Sector GVA per employee</b> <i>Kingston upon Hull, City of</i>	<b>2015</b> £70,588	<b>2021</b> £57,143	<b>Change</b> -£13,445	<b>% Change</b> -19.0%

<sup>45</sup> ONS, [Regional gross value added \(balanced\) by industry: all ITL regions](#), March 2023. The International Territorial Levels (ITLs) are a hierarchical classification of administrative areas.

<sup>46</sup> ONS, BRES, 2021

<sup>47</sup> As GVA is provided at 2-digit SIC, whilst employment is at 4-digit SIC, in order to align with the sector definition (as outlined in the Technical Annex), a proportionate sector moderation has been applied. The proportion of 4-digit SIC employment that comprised 2-digit SIC employment (%) was used to moderate 2-digit SIC GVA data to align with 4-digit SIC employment more accurately.

As shown in the previous table, total sector GVA for 2021 is £224.8m, which represents the value of direct jobs operating in creative industries and the cultural sector in Hull. This is likely to capture the value of activities across creative venues, for example theatres where actors, musicians, lighting and sound engineers, backstage dressers and stagehands, front of house staff and security staff operate and music venues where musicians and performers, sound engineers, venue managers, security and several front of house positions such as bar staff and waiters are employed. In community-based venues, direct jobs examples include centre managers, creative workshop and class leaders, e.g. dance tutors, arts mentors.

To better understand the creative supply chain, a type I multiplier<sup>48</sup> has been used to estimate the indirect GVA of the sector at £78.7m. This represents the value of jobs that operate in other sectors, often providing services required by those directly employed in the sector such as jobs in production of materials and products used by directly creative jobs, for example, the production of materials for costume design or production of instruments, amps and recording equipment for musicians.

A type II multiplier<sup>49</sup> has been used to estimate induced GVA of the sector at £157.4m, which represents supply chain impacts across the economy as a whole, accounting for spending on consumer goods and services by employees working directly in the creative sector, for example actors and musicians spending locally on food and drink.

Taking into account direct, indirect and induced benefits the total value of the sector is £0.46bn.

Benefit	Economic Impact
Total Direct GVA	£224,845,996
- Indirect	£78,696,099
- Induced	£157,392,197
<b>Total GVA</b>	<b>£460,934,292</b>

Source: Kada Research Analysis 2023

## Household Spend

It is possible to calculate the scale of household spend on creative and cultural activities using:

- The number of households with at least one usual resident for Hull in 2021<sup>50</sup>.
- Weekly household expenditure in Yorkshire and the Humber in 2021 for cultural activities<sup>51</sup>.

Using ONS data, resident spend in creative and cultural activities is £14.2m at 2023 prices.

<sup>48</sup>Scottish Government, [Supply, Use and Input-Output Tables: 1998-2019: Multipliers](#), 2022, Type I Multipliers, Creative/Cultural Services GVA Multiplier: 1.35

<sup>49</sup>Scottish Government, [Supply, Use and Input-Output Tables: 1998-2019: Multipliers](#), 2022, Type II Multipliers, Creative/Cultural Services GVA Multiplier: 1.7

<sup>50</sup> ONS, Census Data, [Population and household estimates, England and Wales](#), 2022, See Tab A35, 9.4.2.

<sup>51</sup> ONS, [Family spending workbook 3: expenditure by region](#), 2023, See Tab H01.

Benefit	Economic Impact
Household spend	£14,213,724

Source: Kada Research Analysis 2023

### Volunteers

In Hull and East Yorkshire, large amounts of volunteering activity supports the creative and cultural sectors through HEY! Volunteering. Volunteers from HEY! are trained specifically to improve access to, and bridge the gap between, arts, culture and heritage and hard to reach communities. They support activities such as pop-up arts events and installations, outdoor festivals, mass participation, performing opportunities and community art projects. The wage equivalent benefit of volunteers in creative industries and cultural sector was assessed using:

- The number of volunteers hours worked according to HEY! Volunteering Data<sup>52</sup>.
- The average weekly gross pay in Hull in 2022<sup>53</sup>.

The number of hours worked was converted to a weekly figure and a wage equivalent benefit of volunteers was calculated using average weekly gross pay. The annual impact was converted to 2023 prices to give an estimate economic impact of £18.0m (as shown in the table below).

The wellbeing benefits of HEY! volunteers have also been estimated using:

- The number of active volunteers in the sector according to HEY! Volunteering Data<sup>54</sup>
- The value of volunteer wellbeing on average per year<sup>55</sup>.

After converting to 2023 prices, the wellbeing benefit of volunteers amounted to £2.7m.

Benefit	Economic Impact
Volunteering – wage equivalent	£18,031,007
Volunteering – wellbeing	£2,691,858

Source: Kada Research Analysis 2023

### Wellbeing

Finally, the wellbeing benefits of creative industries and cultural sector in Hull was estimated, using:

- The number of visits made to Hull Museums and Gallery sites during 2022/23 and ‘Large Events’ visitors including ‘Magic of Christmas’ and ‘Medieval Mayhem’<sup>56</sup>
- The average value of engagement in culture and sports per activity inflated to 2023 prices<sup>57</sup>.

<sup>52</sup> HEY! Volunteering data outlines that 22,300 volunteer hours were worked in 2022.

<sup>53</sup> ONS AHSE, Weekly pay – gross for full time workers in Kingston upon Hull (workplace analysis).

<sup>54</sup> HEY! Volunteering data outlines that there are currently 2,434 trained and vetted volunteers on the system.

<sup>55</sup> HM Treasury, [Green Book Supplementary Guidance: Wellbeing Guidance for Appraisal](#), 2021. See page 63.

<sup>56</sup> Hull Museums & Gallery, Annual Summary, 2022/23.

<sup>57</sup> DCMS, [Quantifying and valuing the Wellbeing Impacts of Culture and Sport](#), 2014, See Table 7 on page 13.

Benefit	Economic Impact
Wellbeing	£25,882,548

Source: Kada Research Analysis 2023

### Summary

The table below summaries the economic impact and wider benefits of Hull’s creative industries and cultural sector (as described previously) and the infographic illustrates the headlines.

Benefit	Economic Impact
Total Sector GVA	£224,845,996
- Indirect	£78,696,099
- Induced	£157,392,197
Household spend	£14,213,724
Volunteers: Wage	£18,031,007
Volunteers: Wellbeing	£2,691,858
Wellbeing	£25,882,548

Source: Kada Research Analysis 2023

An infographic providing an overview of the sectors economic impact is shown in the executive summary.

## 5 Stakeholder Insight

This chapter summarises the key findings from the stakeholder consultations. Findings are organised thematically with insights into the distinctive features of Hull's creative and cultural ecosystem and priorities for its development. A spot light on music and film/TV identifies strengths and opportunities for the evolution of these clusters and micro-clusters. Finally, the spaces and places (or 'assets') are considered.

### 5.1 Thematic Analysis

Qualitative insights (43 responses in total) were gathered via consultations with 19 stakeholders and an online survey (24 responses), involving leads and practitioners within Hull's creative industries and cultural sectors. These insights were analysed thematically to explore in detail:

- **The overall creative and cultural ecosystem** to understand the distinct and unique features of creative industries and cultural sectors in Hull.
- **A music deep dive**, focussing on the characteristics of Hull's music scene and what would help to unlock opportunities to further strengthen this sector in the city.
- **A film/TV deep dive**, to capture nature and scale of home-grown production activities and how these co-exists with Hull's increasing popularity as a filming destination.
- **The creative and cultural skills pipeline** in Hull and how this may be supporting or hindering progression of the city's creative arts sectors.
- **Hull's creative and cultural asset infrastructure** portfolio and how this can be enhanced to best support the aspirations for growth and expansion of the city's creative and cultural industries.

For each we explored: strengths, challenges and opportunities associated with Hull's creative and cultural infrastructure; and, future priorities for creative and cultural activities and spaces. Quotes included throughout the chapter are from the stakeholder consultations or online survey.

### 5.2 Creative and Cultural Ecosystem

Stakeholders described the distinctive features of Hull's creative industries and cultural sectors with many providing rich, varied examples of its unique qualities and the strengths.

## Creative Industry and Cultural Sector Strengths

Hull's key strengths include its uniqueness and proud sense of individuality; the breadth and depth of talent make it a genuinely unique creative location, unlike anywhere else in the UK. Drawing on the city's maritime heritage, local artists describe it as an inspiring special place to be creative.

*"I think Hull maintains its sense of individuality".*

*"Many festivals I think are unique to Hull, I'm proud of Hull having the Sesh which is a celebration of the musical traditions of Hull. Very kind of rooted in our community".*

The openness of the people of Hull, means it is 'down to earth'. It is also innovative and resourceful. Being community-centred is part of Hull's DNA and this stands it apart from other creative cities:

*"That was what drew me here, in the first place, there's something good about [it being] a little bit underground. So I came from Leeds, and it's yeah, I don't find Leeds as interesting, in lots of ways. It's a bit sparkly, a bit flashy. Not as kind of gritty, and [it] can be a bit in your face."*

*"It's the honesty and integrity of the people more than anything. They haven't got much, so they make do with what they have got and when they do get together, they like to party... They do like to party, like to have a drink. They're very communal".*

The approachability of Hull's creative artists ripples through to the engagement of Hull's residents in creative and cultural activities. Hull often has an impressive audience turn out for high-profile events and these events are diverse and varied. Creativity and the local arts and cultural scene are respected and embraced by the city's communities, providing a strong platform for promoting even wider engagement across *all* local communities:

*"The Humber Street Sesh Festival - I don't think could happen in many places. You know, at one point, 30,000 people were coming to that... and it was all crowdfunded".*

*"People see Hull as an old-fashioned fishing port. People are very open minded, very friendly, want to do things, they will give absolutely anything a try".*

The area's exceptional, unique location in terms of access, particularly due to its ports in Hull, and nearby Immingham and Grimsby and proximity to Western European markets, its trade heritage and the fact it is known as a trading city means that culturally it is outward looking and open to new influences. International interest and links are well established and the openness of Hull's creative artists goes beyond the borders of the city. Hull wants to be known as an international player in the creative world both for hosting and participation. The city already hosts international events and is eager to be involved in more.

*"There are a lot of nationally and internationally known producers who are working from Hull. And, for example, Freedom festival, has an international reputation".*

Hull is a global gateway and has many international students and migrants settling and contributing to the artistic scene building on its heritage of seafaring settlers. There are hopes to not only attract new talent to Hull, but for local talent to engage with international audiences. Stakeholders believe

this should not be limited to Western centric expressions of art and culture and should bring together different disciplines within the arts to facilitate learning and innovation within and between Hull's creative and cultural businesses and sectors:

*"So, the international aspect for us is really important because it allows audiences and local creatives to see a different way of doing things, to see different methodologies, do different kinds of work, different kinds of multidisciplinary practice, as well as different stories being told".*

*"We should engage better with community activists and leaders and respond to their expressions of culture - we can be too West European centric".*

Hull's creative artists are forward-looking, setting their sights on how the city can develop creatively and culturally. Ambitions are strong and those in Hull's creative industries want to see a future where Hull is synonymous with world-leading events, particularly its music festivals.

*"Kingston Upon Hull has the potential to establish itself as a thriving hub for music festivals".*

*"We're welcoming people in to bring their own take on creativity and [they] make their own futures. So, I think it's in a really exciting place".*

Important assets in the city like the Warren, an Arts Council National Portfolio Organisation, are helping to drive these ambitions. The Warren engages Hull's young people (including those who are far from the labour market) in creative arts at its city centre location with production and performance facilities and an independent record label.

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#### Challenges for the development of the sector

Alongside the strengths identified above, stakeholders highlighted challenges that are constraining the development of Hull's creative industries and cultural sectors.

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. Those living in the local area can miss out on or are unaware of local events and activities; high engagement levels in Hull's large-scale events provides a 'hook' for stronger positioning and awareness raising. Stakeholders believe that a clearer identity for the city is needed. There is a sense of disappointment that gaining City of Culture status in 2017 has not generated sustained momentum or crystallised around a stronger creative profile.

*"I think the profile of the sector is not well understood. And I include myself in that- I discovered something just last week that's been going for years out of an upstairs room on top of a bar, about 50 yards from us".*

*"I often hear people saying they 'didn't know about that' or 'how can I find that out'".*

Fragmentation within and across creative and cultural businesses and organisations in Hull can lead to some creatives feeling unsupported and unsure as to who to speak to and where to find funding opportunities for new projects and initiatives. Limited collaboration is seen as a constraining factor and

stakeholders would like to see more visibility and engagement from the Council and partners to better harness the potential within the city. An example would be building on the success of the Freedom Festival in galvanising culture and the arts. For instance, working collectively across cinemas or galleries.

*"There was a huge opportunity that there were spaces in Hull, and opportunities to access spaces in Hull that many other cities would really want. But paradoxically, I don't feel that there's a huge amount of ownership between those spaces and the cultural organisations, and artists living in Hull. So, you've got this slight contradiction that the two are almost operating a bit separately".*

*"So, there's a lot of skill in the city and particularly around theatre, music, outdoor art making. I think we need to fine tune collaborating together".*

One factor that appears to have influenced the breakdown in communication between the City Council and some creatives is the struggle to secure arts funding and the overall lack of funding has created barriers to collaboration. Funding for art and culture has seen a number of cuts in recent years which has impacted how much money is available to creative artists and what must be done to get it. Many people are also unable to access funding due to a lack of knowledge of how the system works.

*"And he's doing a lot of inclusive work to break down barriers for people to access classical music. But, for instance, he's never applied for funding or got funding because he didn't know how to do it".*

Furthermore, budget allocation is becoming more difficult as funding decreases, leading to greater competition, which in turn can stifle creativity as people are less able to take risks, or invest in new material, talent and collaborative opportunities.

*"If there's not enough structure or financial support, if everybody is competing for the same money and the same funds and the same slice of the pie, it reduces the will for collaboration, because you end up with a more competitive sector".*

### 5.3 Music Deep Dive

Hull's grassroots music scene with independent creators and record labels within it shows that the power in the creative industry in Hull remains in the hands of "ordinary people" who can properly represent the city and there is a fierce sense of pride in this. Stakeholders working in music and events in Hull estimate that there are some 200-300 bands operating in the city covering the full range of genres, including indie rock, hard rock, electronic, folk and jazz. The music scene brings together artists and events managers who have worked nationally and internationally and who have had considerable success in the industry over the years building up a strong network of connections, and some are now working for local organisations with a mission to engage Hull's communities in music and the arts, such as The Warren and the Goodwin Trust. Bands and artists with origins in Hull include The Beautiful South, The Paddington's, Fila Brazillia, Everything But the Girl, Kingmaker and Jodie Langford, amongst many others.

The city provides small, affordable spaces for home-grown talent, giving them an opportunity to find a receptive audience and build a local following. Local musicians are also keen to play an active leadership role in Hull's music sector to support others to

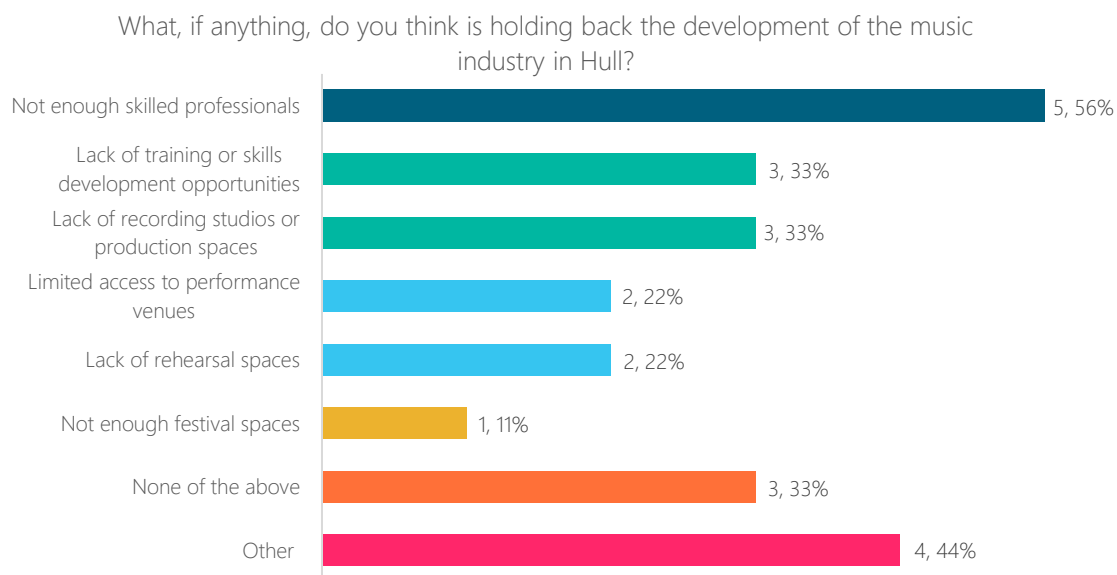


*"I think there is an incredibly experienced, talented music sector in the city, which operates at a very grassroots level".*

Affordability is a strength for Hull in relation to rent and overall cost of living and new, emerging talent can find smaller spaces to perform relatively easily. However, access to larger spaces and opportunities to help talent move beyond the informal "performing as a hobby" stage appears to be limited and may be a push factor for talent to leave the city to seek opportunities elsewhere. Pricing models for the larger more prestigious venues in Hull are meaning that performers, including young performers involved in school-based music activities, cannot access these venues. Stakeholders believe that opening up these venues to community initiatives would help to raise aspirations amongst young people and harder to reach residents.

*"But I think too often the commercial structures of venues can disenfranchise the very people who would actually benefit, there is a real opportunity from [local communities] being able to access them".*

While Hull's grass-roots music scene is seen as a substantial strength stakeholders believe that the wider support infrastructure, including skilled professionals (e.g. with bid-writing experience), to propel talent and help them to progress as musicians is not yet fully in place. There are early signs of this developing, for example, in Hull Music Nets work. Attracting and retaining aspirational leaders in the music scene is considered key to enabling Hull to transition from grassroots towards a stronger music industry where emerging talent can excel. The largest number of respondents to the wider stakeholder survey (5, 56%) believe that a lack of skilled professionals is holding Hull's music industry back (see following chart).



Source: Kada stakeholder survey (n=18)

The emerging findings from the Hull Music Net survey also indicate that the most significant barriers impacting on further involvement in music were:

- Work responsibilities (51%); finance (46%); making contacts and building relationships (39%); self-promotion and marketing (37%).

- Scheduling barriers (28%); sustaining wellbeing (33%); prejudice (e.g. racism, sexism) (18%); lack of knowledge or experience (18%).

Key barriers preventing people from advancing their music careers, noted in the Hull Music Net survey, centre around the themes of: financial risk; difficulty with building a following/marketing; lack of experience; social anxiety / barriers with networking; and, cost of being in the industry (equipment, travel etc.).

#### 5.4 Film/Tv Deep Dive

Affordability of the film scene means that Hull is considered an attractive place for filming and production due to cheaper rental/property prices, lower production costs and ease of securing filming locations for an extended time period. Hull has a strong portfolio of historic buildings and locations that have proved successful in attracting larger companies such as Netflix and BBC particularly for period drama filming. High profile filming has recently included the Netflix time-travelling series 'Bodies' as well as 'The Crown', and 'The Personal History of David Copperfield' 2019 film directed by Armando Iannucci and starring Dev Patel, and the 2015 film 'A Royal Night Out', amongst a range of others (see Chapter 6).

*"Up here, it's a dream for these production companies, because you'll have a village shut down for a big feature film, whereas in America, they'd be wanting big fees."*

At present Hull is seeing some small-scale growth in boutique production companies but is not fully reaping the benefits locally from being an attractive filming location. Hull's filming location assets have the potential to put the city on the film/TV production map, which could assist in further attracting talent, inward investment while stimulating the local economy. However, these opportunities are not yet being fully realised or retained for people living and working in Hull:

*"And will the city be creating those opportunities beyond the odd visit from the film crews to Hull that come and go; parachute in and parachute out?"*

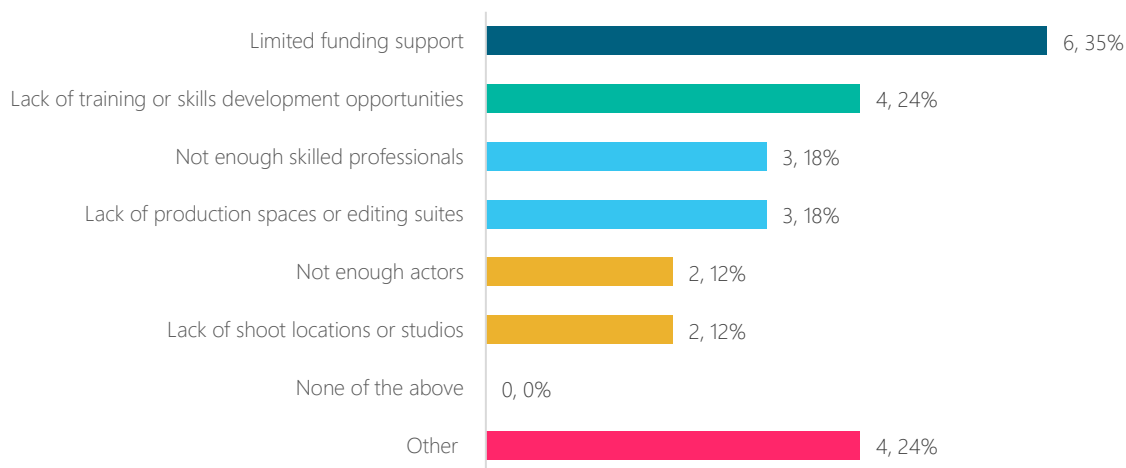
*"The fact that Netflix come up here, and do that that huge budget thing, it's a positive thing but has absolutely zero impact on us".*

Despite these challenges, small production companies are well-placed to scale-up in Hull in part due to the affordability of acquiring a production space and the fact that these businesses do not have large filming space requirements. For example, Nova Studios is a small, successful film production company operating in a city centre terraced building. Stakeholders suggest that the costs of starting up a film/TV production business (namely for equipment or training), particularly for young or new entrants, can present a financial barrier.

Local film/TV producers suggested that funding for buying start-up equipment and shared spaces for new, emerging talent could help young people with potential to get a step on the ladder. This is also corroborated by the wider stakeholder survey responses, which indicated lack of funding support may be holding the local film industry back.

*"To have somewhere that was accessible to either young people or, if necessary, people who are commercial filmmakers. That might be useful to other people".*

What, if anything, do you think is holding back the development of the film industry in Hull?



Source: Kada stakeholder survey

Informal entry pathways could be further promoted given that local experts believe those wanting to go into professional filmmaking should not be restricted to traditional, academic routes.

Notwithstanding the importance of creative arts qualification pathways, potential and talent (not the qualification), are often considered the most important pre-requisite for success and are what small-scale film production companies are looking for. Only drawing from graduates and established professional routes could prevent talented producers from entering the industry, leading to less diversity in Hull's film production businesses:

*"We just want people who can show us a film that they've made and go look, I made this... We don't really want the qualification. We want the proof".*

*"Of course, many council estate areas are full of young talents for music and cinema, but they are under-represented and never have the right opportunities, because they lack the financial requirements to start a course".*

Providing more infrastructure and capacity within the local industry for mentoring and coaching models of talent identification and recruitment is seen as a key element to unlocking opportunities for home-grown potential in film/TV (and music):

*"So, an intensive sort of mentorship programme or something that would help develop a new type of route would help".*

*"And we know from some people working within the sector that have said, it's not always the qualifications that are key, it's actually the talent and they're willing to help mentor, coach and train".*

Stakeholders suggested that developing more opportunities to engage young people in film production, for example applying youth theatre engagement models, would also help in raising awareness of career opportunities in film and TV.

## 5.5 Skills Pipeline

Nurturing new talent is an important strength for Hull's talent pipeline. A key element of fostering emerging talent comes in the form of providing a direction and opportunities for said talent. Getting young people from Hull to engage in the arts scene in Hull is vital to ensure that it continues to progress and maintain the unique elements of Hull. To date, a lack of knowledge, funding and opportunity has led to the arts education scene in Hull being relatively limited. Young people are not acquiring the skills needed to make it in the film/TV and / or music industry even if they have the passion and potential to do so due to the lack of development opportunities in Hull. Individual creatives and organisations are trying to support young people to succeed, however finance and capacity can make this difficult and competition for places is high. Only those with the financial means to send their child through private arts education can gain skills and experience, which means that Hull's creative and cultural scene could be not as diverse as it could be:

*"A lot of people have been doing this for a very long time. So, I think that expertise can be tapped into more and [creatives] could be encouraged to work more civically, or wider".*

*"I don't think we have been very good at explaining the progression routes that we give to children and young people to develop careers in the arts".*

*"For the apprenticeships, we mainly deal with engineering, construction and business admin. We used to deliver, or we piloted a few cultural qualifications when the standards came out, but we haven't since because the appetite's quite low. Within the sector, they [businesses] don't have the funding to pay for an apprentice".*

Retaining and attracting talent is a challenge for Hull. If emerging/established talent feel as though there are not enough progression opportunities, they are likely to take their skills to other cities and settle elsewhere. As Hull is currently not thought of as a place to advance in the creative and cultural industries, creatives rarely choose to move to Hull, which may be constraining the potential for further innovation. When skilled professionals move away, Hull experiences recruitment issues, meaning that work is outsourced to other places and the local area does not benefit from local employment or increased earnings.

*"People are going to increasingly go away, basically".*

*"You see it very much with the media side, I see a lot of people that have got very good skills, but they are struggling to be able to carve a career without moving out of the region".*

An aging workforce in music education or people simply moving out of the sector were cited as potential challenges for Hull's skills pipeline. The issue of young people and their parents/carers understanding the routes into and career pathways within the creative arts was also noted by stakeholders as a constraining factor for the supply of creative skills and talent.

*"We used to have quite a healthy music offer within the city and that was choir singing, it was guitars, it was all of that. And people are just drifting away from the industry".*

*"You don't always have to go to Manchester or London, you know. But I think it's that families are not going to support their young people to do that. If it's not all very clear and talked about regularly the options aren't clear."*

## 5.6 Asset Infrastructure

Navigating Hull's asset infrastructure as a newcomer is a challenge. Hull can be seen as a close knit and unintentionally gatekept community for newcomers in the industry. Parts of the creative sector in Hull are quite informal, with a lot of work being done via mutual connections or word of mouth. Individuals without those existing connections can find it difficult to break into Hull's creative sector, which may lead to them going elsewhere. Whilst stakeholders believe it is important to preserve Hull's close-knit community, accepting newcomers is an important step in broadening creative talent across the city. Having a space or group for new creatives would be useful.

*"Because, again, many people in this city, work in companies that have been around for quite a long time and know all the individuals involved. And if you get somebody [new] coming in, it's really tricky for them, because they've got to somehow make their way through all of that".*

Getting people involved and promoting collaboration is key to maximising Hull's assets. To overcome the navigation issues, some creatives and organisations have taken it upon themselves to provide opportunities for beginners and those working outside of the industry with opportunities for cultural engagement. By viewing film, music and art as a hobby and not limiting engagement to professionals means that more people can appreciate Hull's cultural scene. This is incredibly important as this strengthens the creative sector and creative economy in Hull. The social value of introducing people to art, music and film is not overlooked, with references being made to the impact that getting involved in the creative sector can have on overall health and wellbeing. This is exemplified in the following:

*"So, we do a lot of work which is participatory. So, we open up lots of opportunities for local people, not just artists to get involved in projects. And that's sort of twofold, it's fundamentally to encourage everybody to engage with creative practice. Because we think it's fundamental to society and health and wellbeing. But it's also a way of exposing local artists or creatives at any point in their career, to engage with a different way of doing things".*

Maximising existing spaces provides an important opportunity for Hull's asset infrastructure to transform empty spaces and promote entrepreneurialism. It is not just the informal, cultural infrastructure that has a role to play in unlocking Hull's creative potential, the physical infrastructure is important too. Hull already has creative spaces, but these could be utilised to benefit the industry and the city's communities further. The places that do exist should not be left alone and empty spaces should be revitalised – ideally, they should be continually maintained with up-to-date equipment to ensure these spaces remains attractive to young, new talent and, indeed, talent from elsewhere. Meanwhile uses, say in shopping centres, are being used to good effect. All creative spaces gatekeepers and managers should consider how they can maximise facilities and asset use for education, talent development and entrepreneurship.

*"If the city started shouting, we've got loads and loads of amazing free rehearsal space and studios come and get involved. People will flock to it; people would come".*

*"And I think there has to be a social, educational, inspirational purpose to cultural space. Because otherwise cultural spaces will simply reinforce the idea of elitism".*

*"Upgrading existing spaces and providing access to high-quality resources will attract talent and larger productions to the city".*

Promoting collaboration could also help to open up spaces. The emergence of bigger venues has not pushed out the smaller venues and nor should it. However, costs associated with some of the larger venues in the city are proving to limit their uses, performances and audiences. Fostering collaboration between asset owners, creators and local creative policy leads may help to mitigate for these challenges. There has been good collaboration between National Portfolio organisations in the past and some good examples of outreach activity (see next chapter).

*"It has to be diverse. It shouldn't be some sort of centralised structure that does it all. It should be drawing from grassroots organisations, there are so many of them".*

*"The costs [of larger, central venues] are extraordinary, they're often being driven by a commercial model. The model commands a certain price and to an extent is self-perpetuating".*

*"I think one thing that we need to be talking about at the moment is, unfortunately, subsidising in the sense that there's a lot of artists who won't be able to afford to pay for those spaces".*

*"2017 brought everyone together and the NPOs work together quite strongly. There can be a disconnect though. That's quite normal from artists and organisations. So I think there's so often some disharmony I think they feel like the bigger organisations get to soak up all the money".*

For musicians, the lack of studio equipment and resources can push people away from the city:

*"There's a city full of songwriters and musicians, but very few people are making a career out of it. And when people start to get serious, they leave the city to go to better studios".*

Becoming more climate conscious will help to future-proof Hull's asset infrastructure. Creatives in Hull are aware of the climate crisis and are willing to take proactive steps to ensure their work is sustainable. Looking at the connection between art and climate is also an exciting opportunity for those in Hull, for example to tell stories about climate change and spread awareness. Those with a physical asset are also taking steps to improve the sustainability of their spaces, referencing green priorities and minimising their carbon footprint. More support for collaboration and building consensus around the steps required to achieve a greener Hull are being called upon by stakeholders.



*"We, as a company, are conscious about it, like it [sustainability], it's part the board meetings, environmental sustainability is something that we report against and set targets and priorities for."*

*"Because we've got this whole net zero project, a lot of the businesses are engaged in that. I think there's a way for the cultural sector to be engaged in that further as well. So I would say we are very green, and*

we're constantly looking at how we can be greener. But I think that could be a real thing for the city to play on for the cultural organisations".




## 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>

## 6 Infrastructure Asset Audit

A key task for this assignment was the collation of an asset database so that there was good collective understanding of cultural and creative spaces and places. The aim of this audit was to provide an understanding of the scale and number of Hull's assets and any opportunities and challenges they present. This chapter is a summary narrative of the database that was created to summarise assets and what they offer.

Some time was spent designing the questionnaire which appears in annex 6 in the technical annex, and it was organised to capture two tiers of information. These included high level characteristics about the type of operation and activities hosted (Tier 1) and more detailed information about floorspace, lighting, facilities and accessibility, etc (Tier 2).

Spaces which occasionally offered cultural activities or performances i.e., it wasn't their primary purpose, for example, restaurants, hotels, stadiums, etc. were included. Some organisations working in the supply chain were also captured e.g., promoters and other live music organisations such as choirs or orchestras, producers, writers, technical specialists, etc.

### 6.1 Asset Overview

This section provides a summary of each of main asset types recorded in the database.

#### Film, TV and Video Production

Hull is beginning to subvert common stereotypes about its image and 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, which used the Guildhall building to double as London's legal district<sup>58</sup>. The city has a number of well-known and successful Film/TV and video production assets that have contributed to its turnaround.

Astor Film Productions is an award-winning video production agency with 10 years of experience of working with world class brands and has produced over 2000 videos since its conception. Astor have worked with some high-



<sup>58</sup> Visit Hull, [Hull on Screen](#), 2023



profile clients such as the Great British Olympic Team, Barclays Bank and Siemens, the German multinational technology conglomerate, offering video and postproduction, live streaming, and video marketing services.

Hull also benefits from Northern Films and InterTech media. Northern Films converted their large space in Priory Park to studio use in 2019 and provide feature film, drama productions and documentary filming across their four studios. They have 21 years' experience in the developing of skills for Film/TV and have several feature film projects in the pipeline with plans to expand their operations in the city.



Nova Studios is a small but successful film production company operating in a city centre terraced



building and is one of the UK's leading storytelling and video production companies. Offering services such as script and interview writing, location and casting, animation and graphics as well as drone footage; Nova have worked for clients such as telecoms and broadband providers, civil engineering companies, home builders, healthcare providers, and economic development organisations.

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### A Distinctive and Engaging Theatre Sector

*"I moved to Hull in 1971 because it was the most unlikely place in the world to start an experimental theatre company – plus rents were cheap and social security were unlikely to find us any proper jobs. I was 23 and I believed that theatre could change the world. I still do. I wanted to make uncompromising, provocative, funny, tough, sexy plays about people you didn't see in plays, for people who didn't go to the theatre. I wanted Hull Truck to be a nuisance."<sup>59</sup>*

The creative database has recorded 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 is also a handful of uniquely local touring theatre companies including: Middle Child, The Roaring Girls, The Herd, Indigo Moon Theatre and Silent Uproar. In 2017, Hull New Theatre benefitted from an extensive £16million refurbishment to improve access. Hull Truck Theatre is a pioneering theatre with a unique northern voice, locally rooted and global in outlook. Middle Child, a Hull-based company creating gig theatre brings people together with big ideas and has a space to support theatre development and production. The Roaring Girls are a Hull-based theatre company creating work that is fierce, feminist and fun and Silent Uproar are an award-winning theatre company creating nights out to engage a younger (16- 25), funkier, and punkier crowd. The Herd brings children, young people and families together in playful spaces to share exceptional experiences. Indigo Moon Theatre is a leading children's shadow puppet theatre company that has toured nationally and internationally to theatres, festivals and schools since 2001.

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<sup>59</sup> The Guardian, '[I wanted to be a nuisance': the riotous rise of Hull Truck](#), 2022



As you would expect, the city's two main theatres are very central – Hull Truck Theatre's latest home (opened in 2009 with a number of [low carbon features](#) including solar panels, a bore host and smart building features), has a capacity of 429 including four wheel chair spaces and is two minutes' walk from Paragon Bus and Rail Interchange. Hull's New Theatre is a Grade II Listed Building with a capacity of 1,189 located in St Stephen's Square and is 10 minutes' walk from the railway station. It has a history of collaboration with National Portfolio Organisations (via Cultural Collisions) and many others including the Freedom festival.



The University of Hull's Gulbenkian Centre opened in 1969 (see image). It was the first completely new building for the teaching of drama at a British university and is a little further out of town (2.4 miles on the main campus). The design was by Peter Moro and Partners, who were carving out a reputation for themselves as specialists in theatre design and has an eight-sided plan. At its heart is the 200+ capacity studio theatre, with a television studio (now a second theatre) alongside workshops, dressing rooms, offices, and further audio-visual facilities located around the perimeter of the building. It was listed at Grade II in 2015.



Of course, many music and other venues also host theatre productions and support theatre development. For instance, the Social is hosting Middle Child's Panto in 2023 (an adult version of Red Riding Hood). Middle Child themselves have a new location at Bond 31 warehouse at 42-43 High Street in the museums quarter, backing onto the River Hull with accessible rehearsal space, a [theatre library](#) and office, as well as a new writing room, hot desking space and kitchen facilities.

There are many other multi-functional venues that host theatre. For instance, Middleton Hall at the University has a 406-seat auditorium that can be adapted to host theatre productions, music events and conferences.

There may be future opportunities to work collectively Humber wide. Grimsby Auditorium is an entertainment venue showcasing musical theatre, comedy, pantomimes, and a variety of other events. The largest professional venue in Lincolnshire (and comparable to Hull New Theatres) has a seated

audience capacity of over 1,200 and a standing capacity of over 2,050. The 200-seat East Riding Theatre in Beverly also offers theatre, music and entertainment. In addition, there is the Junction in Goole, a multi-award-winning centre for the arts, and Bridlington Spa, a premier entertainment and events venue with a dance hall, theatre, and conference centre.

Many of Hull's theatre venues tour nationally and internationally and work in local communities. In the past, Hull Truck has delivered half-term workshops for 3-6-year-olds in Orchard Park and the Thornton Estate. It has performed at the Dock and their director claimed that working outside was quite challenging.

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## Music Venues and Events



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 live music venues like the New Adelphi Club, the Welly, the Social and the Polar Bear. The £36m Connexin Live Indoor Arena is a flexible space and City of Culture legacy project which opened in 2018. The venue offers a state-of-the-art, music and events complex with capacity of up to 3,500, attracting corporate conferences, exhibitions and trade tours, as well as major touring concerts, stand-up comedy, family shows and sporting events.

The New Adelphi Club (renamed in the 1980's) is a popular, local, alternative music venue based in what was originally a three-bedroom terraced house built in 1888. The venue, which won UK Grassroots Venue of the Year in 2022, is one of the UK's celebrated underground music venues; synonymous with bands such as Pulp who spent many of their most formative years playing there.



The Polar Bear, Photo: Dandrew Photography

The Welly is Hull's oldest nightclub and a legendary, alternative club and live music venue; and the Social in the Fruit Market is a warehouse turned venue space with 2 bars offering music, art, film, theatre and more. DIVE HU5 is an independent bar, music venue and coffee shop. Many of the music venues are clustered around the HU5 postcode and the popular Princes Avenue in north-west Hull. The Polar bear (rescued in 2020 via crowdfunding) is a music venue and self-proclaimed 'haven for indies'.

Hull's Eclectic Music blends together music and musicians from a wide variety of backgrounds in their Grade 1 listed and National Trust owned Georgian building. They offer rehearsals, music and performance. Influences range from classical and contemporary to pop/rock, jazz, world music, motion pictures, and musical theatre.

The Beats Bus brings elements of hip-hop break-dance, graffiti, MCing and DJing to young people through their mobile unit which has a recording studio offering song writing, street dancing and creative art.

Although not captured in the asset database, it is worth noting that Hull has an inclusive, vibrant and flourishing music scene and a high-profile range of distinctive events and festivals including the region's biggest LGBTQ+ festival and Humber Street Sesh drawing on the city's 200+ bands. With so many bands operating at any one time it is not surprising the city boasts many recording studios. Six are listed on the asset database and we suspect there are more<sup>60</sup>.

The Freedom Festival has a weekend dedicated to art, music and theatre and a full programme working with creatives, arts and festival professionals and artists. Hull's annual (17th) comedy festival returned in 2023 with comedy acts from all over the UK at multiple venues across Hull city centre. Hull Jazz Festival brings the best in world of jazz and improvised music to Hull twice a year, with Summer and Winter Editions in July and November.

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A rich and diverse range of arts organisations, museums, galleries, and libraries

These assets celebrate the art and maritime heritage of Hull and East Yorkshire. The museum quarter in HU1 includes a number of attractions just off the old town including:

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<sup>60</sup> Rockit Studio, Hairy Monster Audio, Unit 45 Recordings, Uylsses Records & Recording Studio, Gorilla Studios, Element Recording Studio



- The Hands-on-History Museum - exploring the story of Hull in the old Grammar School where Hull's famous abolitionist William Wilberforce once studied.
- The Street Life Museum – an immersive world of bicycles, carriages, motorcars, railways, and street life (see image).
- Wilberforce House Museum - the oldest museum in Hull tells stories of the struggle against slavery.
- The Hull and East Riding Museum offers some of the UK's most fascinating displays of archaeology and natural history, including the only dinosaur bones to have been discovered within East Yorkshire.
- The Deep offers a journey through the world's oceans.
- Hull Maritime Museum offers 800 years of maritime history and stories of the sea. It is reopening in 2025 (See image).

Hull has 12 libraries hosting a variety of cultural workshops and events throughout the year, for all ages and interests<sup>61</sup>. The central library has maker space with 3D printing, laser cutting and illustrator. Events organised by Hull Culture and Leisure include reading, pottery, arts and crafts (Yuletide Yap and Yarn), reading, dancing, and music activities (toddler tunes, street dance) including several aimed at parents, babies and toddlers and children. They also have regular seasonal events, festivals and extensive children's summer activities. For instance, the Avenues Library had winter stories (in partnership with Hull Truck) and toddler tunes and Greenwood Library had a Halloween event. Anlaby Park Community Library is Hull's first and only community run library and offers art and craft sessions and hosts regular book clubs.

The central library has an Encore Music Service offering sets of vocal and orchestral music to groups and organisations throughout the UK. It has one of the most comprehensive collections of printed music in the country. Sets can be borrowed by choirs, orchestras, educational establishments, operatic societies and individuals for performance or study purposes.

There is a broad mix of formal and contemporary arts organisations and galleries. These include:

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<sup>61</sup> Hull Central Library, East Park Library, Bransholme Library, Ings Library, Avenues Library, Greenwood Avenue Library, Fred Moore Library, Western Library, The Freedom Centre, Gipsyville Library, Waudby Centre, Longhill Library.

- Ferens Art collection of some 2,500 works ranges chiefly from the 16th century to the present day and includes a noted group of Old Master paintings; one of the most important English regional galleries.
- The University Art Collection which specialises in 50 years of art in Britain (1890-1940). It also has an exhibition space including East Riding Artists (ERA); a growing platform for local sculptors, mixed-media-creators, painters, ceramicists and jewellery-makers.
- Art Link Hull are an arts and educational charity working with under-represented people to improve prospects and deliver positive social impacts.



- Humber Street Gallery is a contemporary art space located at the heart of Hull's Fruit Market with a continual programme of exhibitions.
- Studio Eleven (see image) is a gallery and workshop space offering specialist studio space for ceramicists and a shared workshop for printmaking. Events include artists talks, performances, workshops, studio hire and a rolling programme of exhibitions featuring contemporary ceramics and painting. It has main space for wall-based and plinth mounted work, and six display cases.

There are many organisations working in the sector too. Studio McGuire are award-winning, immersive artists and Ocular Art are contemporary art exhibition specialists. Aba Daba Circus is a multidisciplinary entertainment company.

Hull Independent Cinema screens the best in art house, world, independent and short film and there are mainstream cinemas too, including Hull Cineworld, Vue Cinema, Oden Luxe and Reel Cinema. Hull used to have a film festival.

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### Faith and Community Based Assets

In addition to the libraries, there are many faith-based organisations that offer creative and cultural activities. The Nordic House/Danish Church has been serving the spiritual needs of seafarers and the wider community in Hull for more than 150 years. It hosts a range of community and cultural events, exhibitions and workshops. Hull Minster hosts a range of activities including history and heritage events and diverse mix of music performances, from choral and orchestral to contemporary. The Minsters distinctive city choral education strategy aims establish Hull Minster as a centre of excellence for the Anglican Music Tradition and organ music, while encouraging as many young people as possible to develop their aptitude for singing and their love of music. The Minster also aims to help young people

achieve a nationally recognised standard of musicianship and help them develop through a ten-year education programme.<sup>62</sup>



Faith organisations can play an important role in deprived communities too. For instance, St Michael's Youth Project covers north Hull and Orchard Park and offers support for children and young people aged 5 to 24 years old and families including arts and crafts. St Mary's Church Lowgate Hull (See image) hosts maritime and folk sessions as well as art (hosting the Hull Art Circle Exhibition) and heritage talks.

Many community organisations offer dance classes. There are also four dedicated venues: Dynasty Dance Academy, Calvella Dance Studio, D'Angelo Dance Academy and StreetStars Dance Studio. Three are located in the centre of town and one, Calvella, is in Anlaby, on the outskirts of west Hull. The Calvella School of Performing Arts is a modern purpose-built studio fitted with mirrors, barres, central heating, disco lights, double sprung floor and good changing facilities. It offers the full range of dance styles. Established in 2020 Dynasty Dance Academy offers adult dance classes in jazz, commercial and heels classes for a variety of levels, as well as private sessions, workshops and dance parties. Established over 20 years ago, D'Angelo Dance Academy, one of the largest in Yorkshire, has a new facility with two studios: a main dance floor of 3,000 ft<sup>2</sup> and 2000ft<sup>2</sup> training studio. It has a new bar, increased seating and an extra-large stage to increase both the range and frequency of classes and offer special events and celebrity entertainment evenings. It specialises in many dance styles<sup>63</sup>. StreetStars offers training in Hip Hop and street styles. While not a dedicated studio, there is also Hull Dance within the Feral Arts School, providing an independent, informed local voice. The organisation works in partnership with Hull City Council to develop dance across Hull. They currently operate out of a rehearsal studio on the top floor of a former Co-operative bank.

There is a strong presence of community organisations offering cultural activities. Over 24 community centres, associations and spaces were recorded in the asset database covering HU1-HU7 postcodes including the most deprived wards. They include a mix of buildings of various ages and conditions such as:



- Organisations representing different ethnic groups including the Hull Afro-Caribbean Association and the Hull Chinese Cultural Centre – the latter runs cultural events, workshops and performances.
- The Lonsdale Community Centre (see top image) is a well-established community

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<sup>62</sup> Hull Minster, [Choir](#), Accessed 2024

<sup>63</sup> Ballroom and Latin, Freestyle, Street Dance, Slow Dance, Line Dancing, Barn Dance, Ballet and Tap.



centre opened in the early 1980's in a former two-story Sunday school. It offers a comprehensive range of activities.

- Kingswood community Centre is run by a local church and has a large hall for hire (see image) and offers a range of activities including dance.
- The Alf Marshal Centre offers a wide range of activities (see image). The current building is made up of nine mobile portable units (six second hand and three new). There is a main Hall with capacity for 80 – 100 and three other smaller rooms accommodating 40, 20 and 10.



- Springbank Community Centre are a small charity offering community arts and other activities.
- The Freedom Centre offers activities aimed at adults and families as well as health related activities.
- Balfour Community Centre is a community centre offering a hub for events, activities and other functions for the local population.

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### Event spaces used for culture and creative events and activities

There are many other spaces used occasionally or temporarily for cultural and creative events and activities; they include:

- Six hotels, for example it is possible to go wreath making (Hilton Doubletree) or attend a murder mystery event (Holiday Inn Hull Marina), craft workshops (Manor Rooms on the Drewton estate) and/or seasonal events (Mercure Hull Grange Park Hotel).
- Social Clubs such as the Willows Social Club that host musical acts.
- Outdoor spaces like the Fruit Market - regenerated warehouses and cobbled streets transformed into independent retail, galleries, restaurants, boutiques, and culture activities. The Market also includes the Stage at the dock. A versatile outdoor auditorium with a capacity of 350, holds a diverse range of performances and events from site specific shows and touring productions to corporate and community events.

There are several eclectic and more specialist events spaces such as:

- Union Mash Up is a bar featuring art, cinema, comedy, music, poetry and theatre with an 85-person capacity Function Room with PA, lighting and air conditioning.





- Built in 1960, Jubilee Church Hull purchased the building in 2013 and have been renovating the space to make it into one of the city's leading venues for events. Jubilee Central now houses a 630-seater auditorium, a 120-capacity multipurpose hall and numerous other rooms that are perfect for one off events or regular group bookings.

- Ron Dearing College (STEAM Studios) which has hosted arts talks and arts and craft fairs.



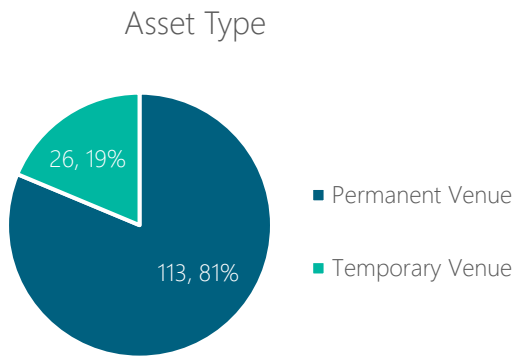
- Leisure and shopping centres that also host cultural events/activities/. Examples include:
  - Back to Ours - Bransholme Chat at The Living Room at North Point Shopping Centre) is funded by The National Lottery Community Fund. It brings people in the community together.
  - HARI (Hull Artist Research Initiative) an experimental multidisciplinary arts venture, set up in 2021; an artist-led not for profit located within a meanwhile shopfront space, provided by Prospect Centre to produce and host activity and encourage artists in residence.
  - Special Stars Foundation at Princes Quay offers a range of workshops including pottery workshops for adults with learning disabilities.

- East Hull Community farm which holds creative craft, music and dance for adults with additional needs.

6.2 ASSET CHARACTERISTICS

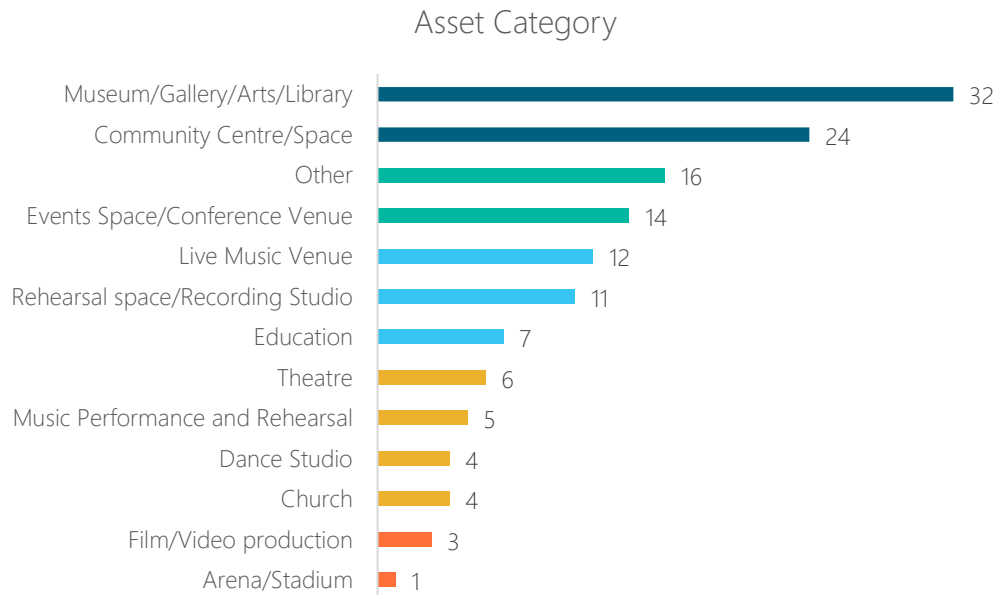
This section analyses the findings of Hulls creative and cultural infrastructure recorded within the asset database. In total 139 entries comprising of both permanent and temporary venues were made to the database. A further 36 of these were assets that do not have a space (or one that they consistently use in the case of temporary assets) that offers cultural activities or events to the public. For this reason these assets are not included in the subsequent data visualisations.

Overview



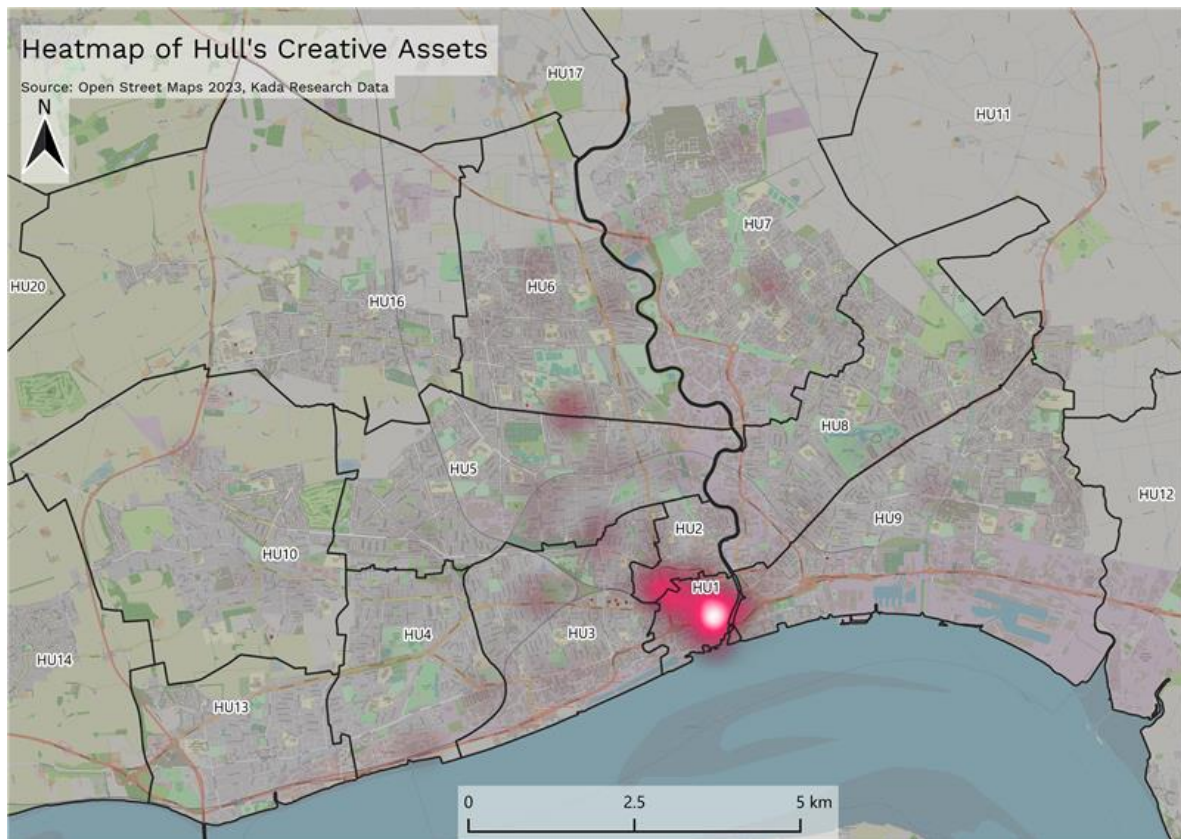
The majority of Hull’s current creative/cultural infrastructure are permanent assets (113, 81%) with less than a third recorded as temporary locations (26,19%). The permanent facilities included those you might expect, e.g. theatres, music performance / rehearsal spaces, galleries and event spaces etc. Temporary venues included some community centres and halls etc, that are used occasionally for cultural and creative activities.

Source: Kada Research Analysis 2023 n=139

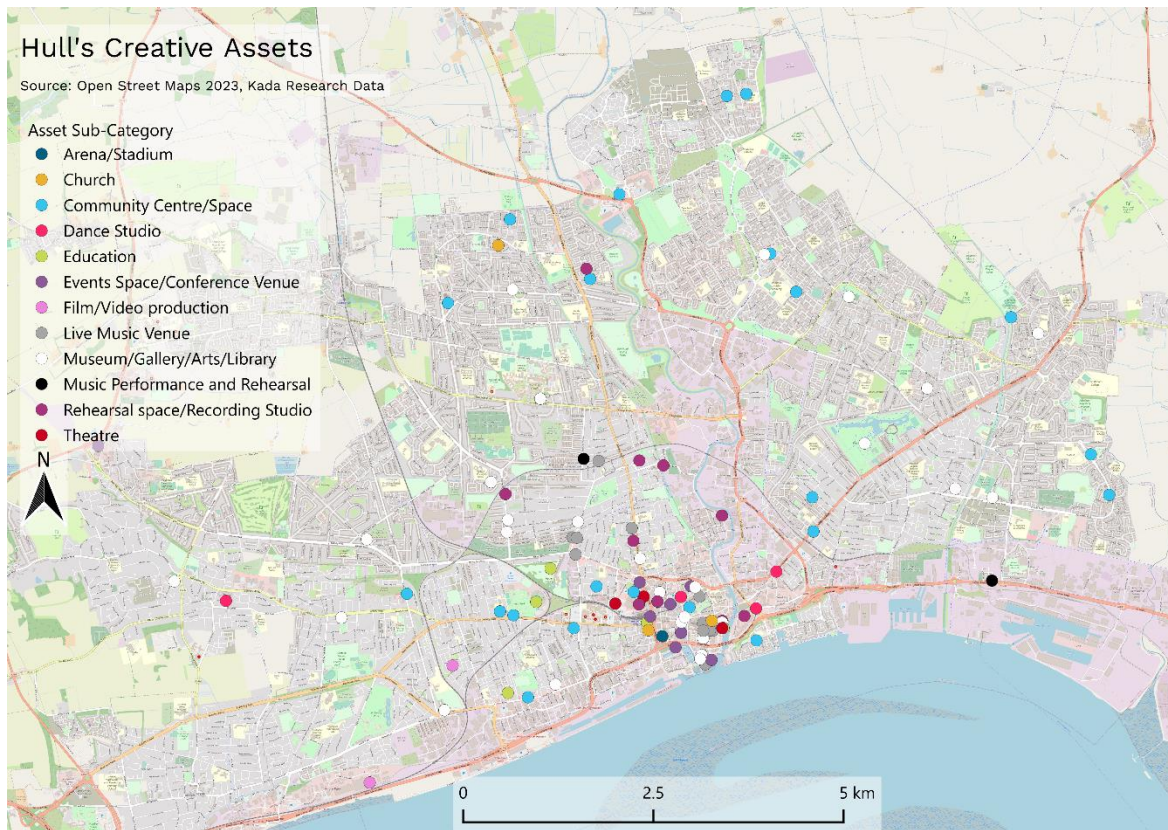


Source: Kada Research Analysis 2023 n=139

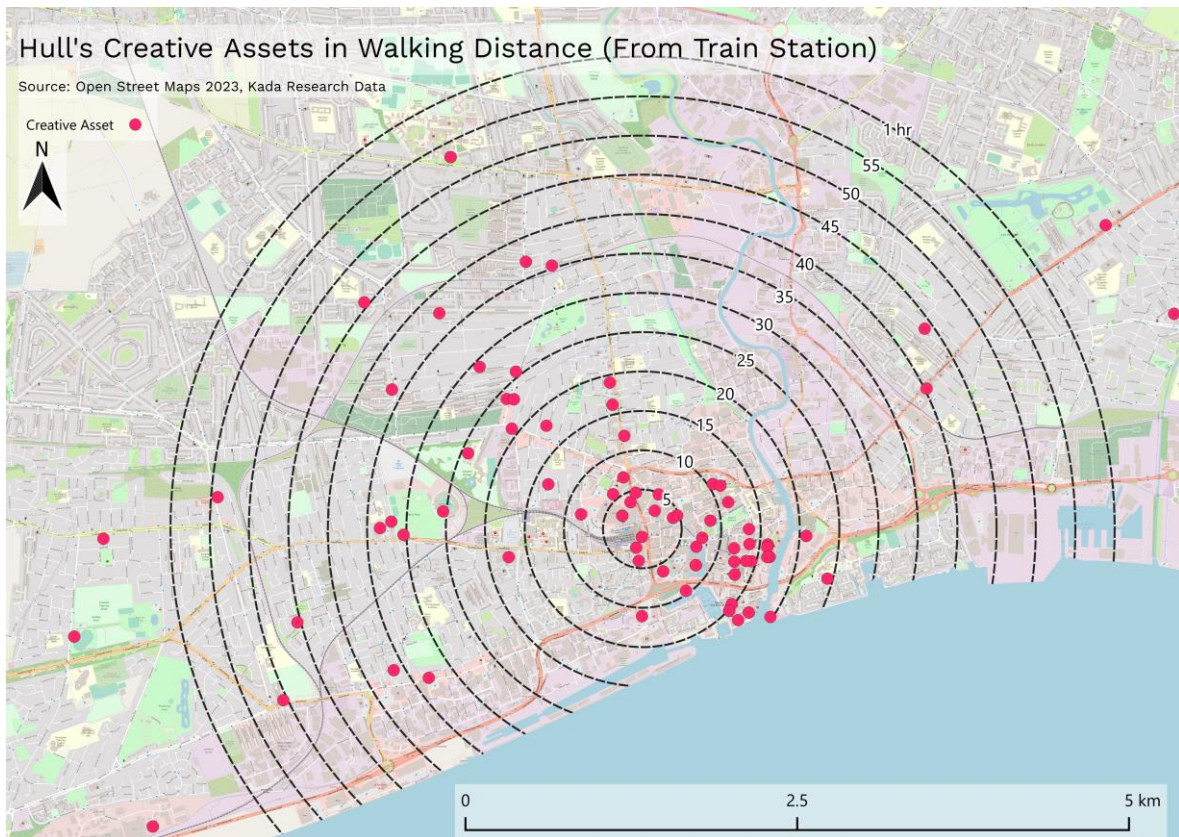
The most common asset category is museums/Galleries/Arts and libraries, representing 32 respondents (23%), including Ferens Art Gallery and the Hull Maritime Museum. This was followed by Community centres/spaces (24, 17%) such as Lonsdale and North Bransholme Community Centres.



The above asset heatmap shows the concentration of Hull's cultural and creative assets. There is an evidently high concentration in the city center, east of the train station towards the Old Town, Museum Quarter and Fruit Market to the left of the river. Postcodes HU1 and HU2 contain the greatest number of assets, there are also concentrations further from the city center within HU5 HU6 and HU7. The surrounding postcode regions of HU11, HU12 and HU14 have very few assets and do not show any concentrated areas on the heatmap.



As depicted by the heat map, Hull's creative assets are largely concentrated within the centre with the exception of community centres and museums/arts/galleries/libraries which are more dispersed. Libraries and community centres are found all over the city. Film and TV production assets are both located to the east of the city, likely as a result of space requirements. In contrast, the majority of recording studios/rehearsal spaces are within the centre of Hull, which is likely a result of space requirements being smaller and a need to be accessible to customers.



The map above shows concentric distance bands for the number of creative and cultural assets within walking distance from the train station. Each circle represents an additional 5-minute interval:

- Within a 5-minute walk there are 10 assets (7%)
- Up to 10 minutes- 20 assets (14%)
- Up to 15 minutes- 35 assets (25%)
- Up to 20 minutes- 46 assets<sup>64</sup> (33%)
- Assets become less concentrated outside this range (no more than 7 in each band)
- There are 31 assets (24%) that take over an hour to walk to.

## Facilities

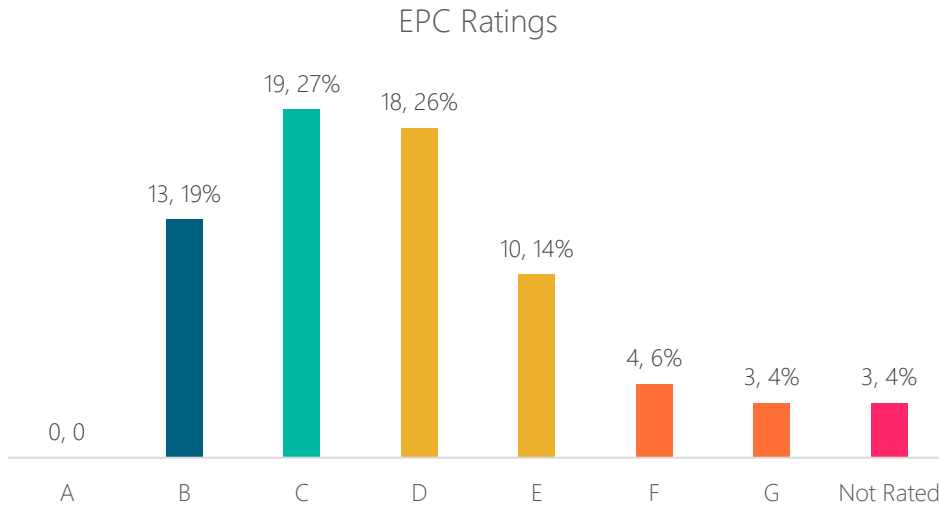
In terms of facilities overall:

- Just 2 out of 139 venues/assets are currently not in active use.
- The most common offer within the recorded facilities were a Sound/PA system (30 citations), space for seated audience (27) and rehearsal space (26)
- 71% of respondents said their premises were licenced. Whilst only 48 respondents answered this question it does show that many organisations operating in the cultural and creative sector will

<sup>64</sup> These interval bands are cumulative.

employ designated premises managers to supervise the sale of alcohol on the premises. This brings additional responsibilities including the prevention of crime, disorder and public nuisance, public safety and the protection of children from harm. There are also many bar or restaurant roles such as front of house positions, e.g. a bar person or waiter and a back of house role - a sous chef for those serving food, etc.

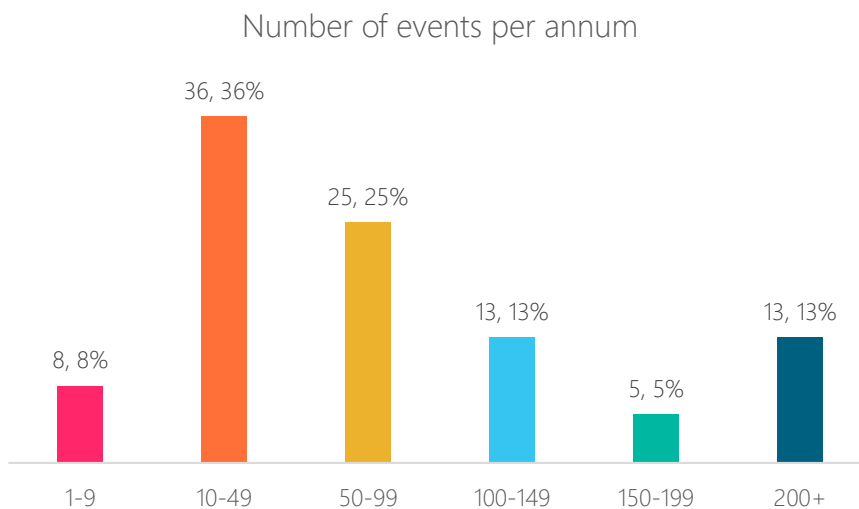
- Of the 23 people who responded to the question 'have you applied for a temporary events notice in the last year', 16 (70%) said no, 5 (22%) replied yes and 2 (9%) were unsure. This is indicative of the ambition and aspiration held by Hull's spaces to deliver larger scale one off events throughout the calendar year, something that exceeds the remit of the current license.
- 41 responses indicated when the venues were established. The oldest was York Minster 1300 and the newest was the Connexin area (2018). Many have repurposed old spaces. For instance Feral Art School was established following an initial grant from Hull's 2017 legacy fund and has since received funding from Arts Council England's National Lottery Project Grants and the National Lottery Community Fund, which has helped facilitate the move into the former bank
- In terms of other facilities main halls, side rooms and print rooms were all mentioned several times with some assets referencing more unique facilities such as a distillery at Hotham's and a green room at the Social. Basic amenities were provided in all (public/audience toilets, access to water and electricity, of which three phase is more common in larger commercial venues).
- Data on accessibility measures was limited based on the responses provided but the most common accessibility feature was wheelchair support (32) followed by accessible bathrooms (21) and assets that were assistance dog friendly (16). Only three assets referenced having accessible parking
- Energy efficiency ratings (EPC ratings) of C and above are considered above average in terms of energy efficiency. Newer buildings are designed to meet stricter building standards and as a result tend to have higher EPC ratings and all landlords of privately rented properties in England and Wales must achieve at least an EPC rating of E. The majority of assets within Hull recorded EPC ratings of either C (19,27%) or D (18,26%) with 50% below the average target standard of C. The three lowest scoring assets by this measure were all community centres, with one recording an F rating. This is likely reflective of the number of older and listed buildings within the city. Those that recorded a good EPC rating (B) were spread across a variety of asset classes and not clustered within one particular asset type (i.e. museums/art galleries etc.). On average each asset class as a whole averaged a C rating or lower.



Source: Kada Research Analysis 2023 n=70

### Capacity, Programming and Finance

- Information on the number of events was only captured for 100 assets. The number of events held by assets per annum varies considerably. 36% of assets (36) host 10-49 events p.a., whilst 13% (13) host 200+. Every respondent held at least one event per year. 93% of respondent venues hold events more than once a week and 30% (14) hold events daily



Source: Kada Research Analysis 2023 n=100

- The majority of respondents (60%) hold performances day and night and 87% on both weekdays and weekends
- Chargeable rates varied dependant on the asset letting the space. Some such as recording studios charge by the hour (approx. £20 an hour based on responses), some charge by head such as the Minerva while others have fixed fees for larger events i.e. Community and Shopping centres

- Turnover per annum varied considerably between assets. The most common response was £1m+ (10,24%) largely influenced by Hulls major cinemas (Odeon/Vue/Luxe/Cineworld) and the presence of Northern Films. This was followed by £10,000-£50,000 (9,20%) which constituted a number of assets from art galleries such as Feral Arts and some larger community centres
- The most common source of funding was through the Arts Council (8 citations) followed by the National Lottery fund (3). One asset referenced government grants as their key source of financial aid.

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### Listed buildings

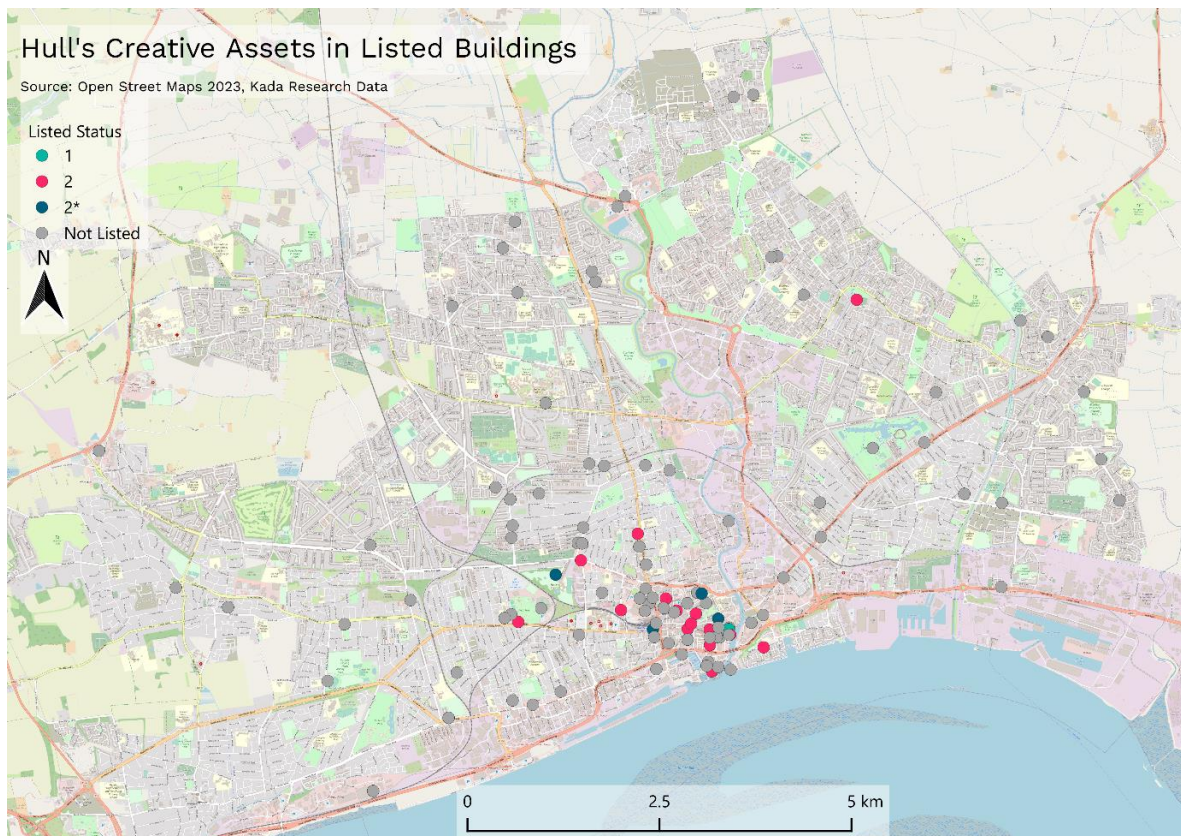
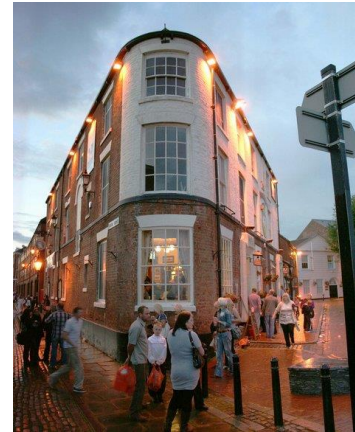
Historic buildings and spaces shape a city's identity, and its heritage adds to the unique character of place, signifying their culture and playing an important part in shaping peoples' perceptions and authentic experience of it. Many of the assets that enable local traditions and knowledge to continue, and the historic environment provides a sense of beauty and distinctiveness. There are clear links between the listed buildings in the cultural asset database and the city's 26 conservation areas. Many of the listed buildings are clustered in the old town conservation area which covers 133 acres in the Southeast corner of Hull. It has a surviving medieval street pattern, archaeology and fantastic architecture and some 40% of the city's listed buildings. The Old Town conservation area has a mixture of building styles (remnants of medieval timber framed buildings, Stuart architecture, Georgian buildings, Victorian architecture and statuary as well as impressive Edwardian public and civic buildings) that adds to the character of the conservation area. It is dominated by Hull Minster. The Old Town boasts a museum quarter with an impressive concentration of cultural assets including four museums: the Hull and East Riding Museum, The Arctic Corsair, the Streetlife museum and the Wilberforce museum. In addition to these there is also the Ferens Art gallery and the Maritime Museum. Other examples include the Welly on the Beverley Road Conservation Area – built in 1913 it has pleasing rusticated rendered frontages and 'Queen Anne' gables to Wellington Lane.

The database shows there are three Grade 1, four Grade 2\* and 22 Grade 2 listed buildings including a rich mix of periods and styles reflecting the history of Hull. Examples include:

- Hull Minster built around 1285 it is one of the Hull's last Grade I listed buildings, it has strong connections to great people like William Wilberforce, stained glass windows of national significance, and survived both Zeppelin raids and Nazi bombings during the first and second world wars respectively.
- Eclectic Music's activities take place at their grade 1 listed Georgian venue in Hull's Old Town.
- NAPA: Northern Academy of Performing Arts built in 1904 (Grade 2\*).
- Hull History Centre – a state of the art Grade 2\* highly visible heritage lottery funded joint venture between Hull City Council and Hull University to provide new accommodation for both the city archives and local studies collection and the University's collections (which include the Larkin Archive and the records of Liberty and various political groups). The building is located on the eastern edge of the city centre, on a key route linking the city centre and the east bank of the River Hull.



- The current Grade 2\* guildhall, which was designed by Sir Edwin Cooper to accommodate the civic offices and law courts, between 1906 and 1914. A time ball, a mechanism which enables navigators aboard ships to verify the setting of their marine chronometers, was installed at the top of the clock tower when it was built. The guildhall time ball is believed to be the last and highest to have been installed in the UK, its restoration began in 2016 and was completed this year (2023).
- A few Grade 2 live music venues including the Welly, the Polar Bear and Minerva. Established in 1829, the Minerva pub (see image) stands strikingly at the top of the marina looking out over the vast River Humber.
- Six Grade 2 museums and the library including Ferens Art Gallery – a handsome civic building constructed in 1927 and the Hands-on History Building – one of Hull oldest buildings with its Tudor structure, original brickwork and mullioned windows.



## 7 Conclusions and Priorities

This final chapter summarises the headline conclusions from the study bringing together stakeholder observations, asset infrastructure insights and economic evidence.

### 7.1 Conclusions

The conclusions draw out potential priorities which Hull City Council and its partners may wish to consider when developing the new cultural strategy and bidding for new programmes.

#### 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. Equally in line Hulls UNESCO ambitions, using other UNESCO music cities as cases of best practice will help shift, galvanise and strengthen the sector.
- 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 is the offer for creative talent and how is this best achieved?

#### 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, community dance 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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