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Hull City Council Creative Industries and Cultural Sector Impact and Infrastructure Asset Audit

Findings
January 2024

Contents

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Study Objectives and Approach

Study Objectives and Outputs

Commissioned by Hull City Council (July 2023) to undertake:

1. An **economic assessment** of the creative and cultural sector to help inform future bids (UNESCO) and cultural strategy with a focus on music and film/TV production.
2. Am **impact assessment** of the creative industries and the cultural sector including its employment and labour market.
3. An **infrastructure mapping exercise** to identify Hull's creative and cultural assets.

Study Approach

Economic Profile and Impact

Creative and Cultural Employment (2015-21)

6976
Employed in creative and cultural roles (up 6.6%, 433)

3180
Working in Content (i.e. media, press, radio/TV).

+53.6%
Increase in Film/TV Employment

-12.5%
Decline in Music employment

+167.1%
in Software Employment (+1,117) Programmers/software developers the most common occupation

9th
Of 16 comparators in CC employment (7th for Film/ TV and 12th for Music)

32%
Of the sector hidden from official statistics (2232)

Creative and Cultural Businesses (2015-22)

430

Creative and cultural enterprises (up 2.4%)

145

Software related enterprises (up 3.6%)

+33%

Increase in Film/TV enterprises(+5)

+50%

Increase in the Experiences (performing arts, museums etc.) sector

no change in the number of **MUSIC** enterprises

14th

Of 16 comparators in CC enterprises (9th for Film/TV and 14th for Music)

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Economic Impact

£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)

Stakeholder Insights

Stakeholder insights (1)

	STRENGTHS	CHALLENGES
Creative and Cultural Ecosystem	• Individuality • Community Openness • International Interests/Links • Ambitious	• Communications & profile • Fragmentation • Funding • Growth threatens unique culture
Creative and Cultural Asset Infrastructure	• Variety of venues • Unused historical/ cultural buildings • Location affordability	• Resilience & silo working • Navigating as a newcomer • Affordability (larger venues)

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Stakeholder insights (2)

	STRENGTHS	CHALLENGES
Music deep dive	• Grassroots & Inclusive • Artists and record labels • Affordability to create	• Lack of skilled professionals • Access to funding • Affordability to develop careers
Film/TV deep dive	• Location attractiveness/ affordability • Emerging production companies • Inclusive informal pathways	• Retaining large scale filming benefits • Retaining and attracting talent • Access to funding/shared space
Skills pipeline	• Sector-leading models for young people and inclusivity including an Arts Council NPO	• Nurturing new talent into sustainable pathways • Retaining and attracting talent

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Skills Pathways

Skills Pathways

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

Asset Base

Hull's distinctive creative and cultural offer

200-300
Bands representing the city

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

5000
Musicians performing across Hull

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

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

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

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

Performance and theatre cluster
innovative productions with international ambitions

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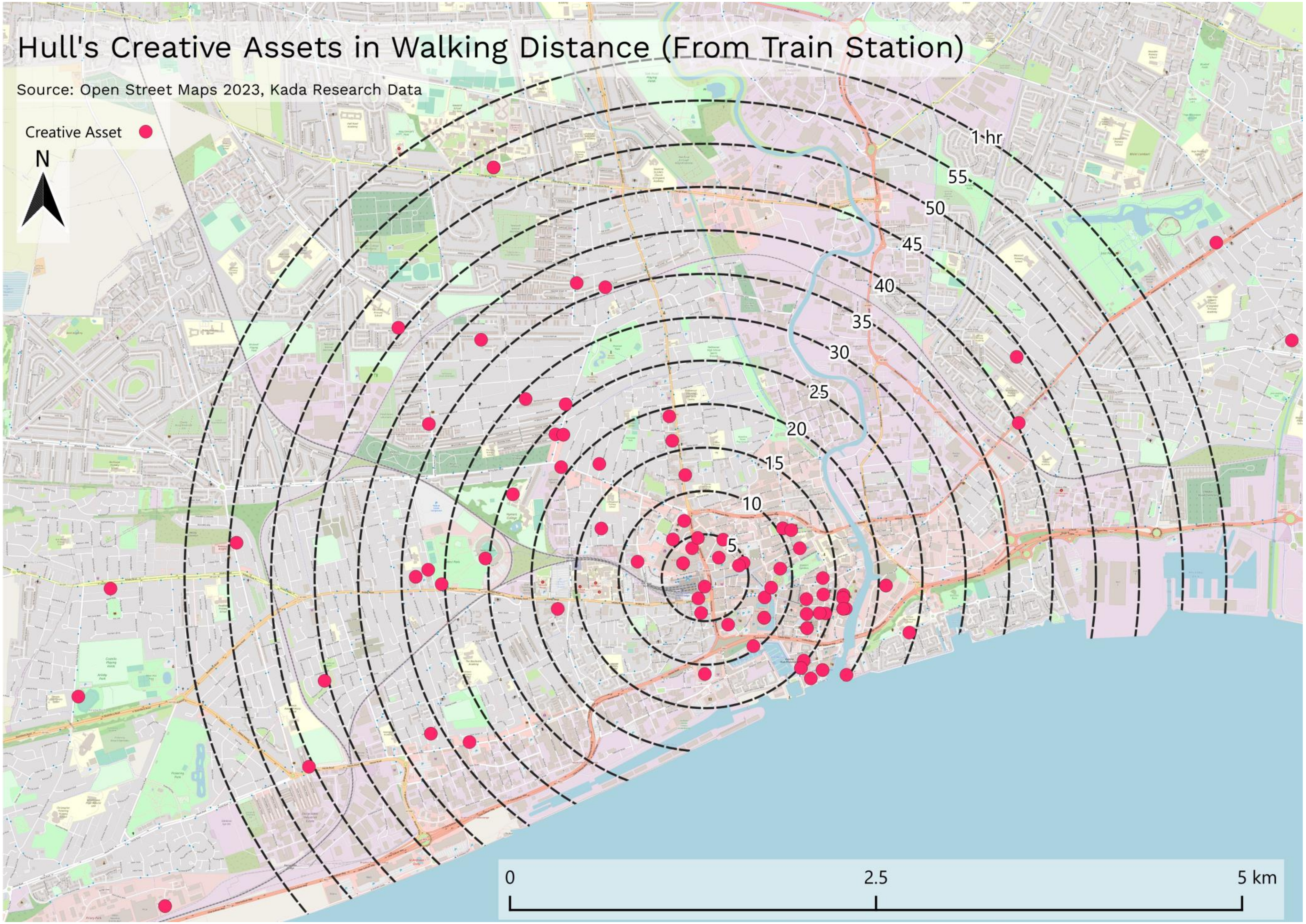

Hull's Creative Assets in Walking Distance (From Train Station)
Source: Open Street Maps 2023, Kada Research Data
Creative Asset
N
1 hr
55
50
45
40
35
30
25
20
15
10
5
0
2.5
5 km

Asset Survey

160+ Assets

29
Listed Buildings

25%
Within 15 min walk from station

50%
Have EPC ratings below C

93%
Hold 1+ event a week

81%
Are permanent assets

24+
Community spaces

32
Museums, galleries and Libraries

4
Dance venues

4 & 5
Production companies; Cinemas

3 & 7
Theatres; Touring Groups

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Summary

Headlines (1)

1. An exciting and challenging time for the creative and cultural sector in Hull.
2. Nearly 7000 people working in sector & 2200+ freelancers including vibrant digital creatives.
3. Vital part of Hull's economy, employment and well-being.
4. Skills pathways need promoting, reviving and funding.

Headlines (2)

4. An incredible blend of cultural buildings, assets and organisations. Potential for more (a) collaboration (b) enterprise (c) scale-up activity (f) financial solutions. Raising their profile/promoting awareness could further stimulate home-grown & new talent.
5. Excellent examples of community engagement and innovative delivery in wider communities.
6. Promotion of bands/music & TV/filming location opportunities.

How might becoming a music city unlock new benefits & opportunities and build on the identified strengths of this study…..?

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Observations?
Questions?

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