NEW ANGLIA LEP

CULTURAL STRATEGY

EVIDENCE REPORT – APRIL 2021

HATCH

HATCH

Evidence Base **Contents**

Headline **Findings: New Anglia's Cultural Economy**

6,985 jobs

£272m
GVA per annum

24% employment growth in last 5yrs

-28%
fall in GVA in Q2 2020

1,250 businesses

2nd
most impacted sector from COVID-19 (after tourism)

0% business growth over last 5yrs

62%
of workers aged 16-24 or 50+

Headline **Findings: New Anglia's Cultural Economy**

Opportunities to maximise…

- A **rapidly growing cultural sector** (pre-COVID-19) with strong employment growth over the last five years
- A significant sector for New Anglia, **supporting a number of other sectors** across the economy (including creative industries, tourism and digital).
- Sector has a number of sub-sector strengths, which provide a **unique identity** to the area's offer.
- New Anglia has a range of **well-established cultural locations** (principally New Anglia's largest urban areas) alongside a range of **rapidly emerging areas**, in which cultural activity is starting to become more prominent.

Challenges to address…

- COVID-19 has had a **significant impact** on New Anglia's cultural sector, being the **second hardest hit** after the tourism sector.
- The sector's high proportion of small businesses, rural communities and dependence on cultural tourism has made it **more vulnerable to the impact of COVID-19** compared to the national picture.
- The sector lacks diversity across its workforce (including gender, sex, age and sexual orientation). New Anglia also has an increasingly **ageing workforce**, with 43% of the workforce aged over 50.

Introduction & Evidence Approach

The New Anglia LEP Culture Board has commissioned Hatch, Tom Fleming and We Made That to work with them to develop a new cultural strategy for the region, developing the structures, plans and projects needed to underpin the cultural sector's recovery from the COVID-19 economic recession and maximise the role of the cultural sector in regional recovery.

To inform the development of the strategy for the cultural sector, this report provides an **economic data pack** which seeks to **inform and measure the Culture Board's work**, and to demonstrate to partners, current and potential stakeholders, the cultural sector's economic value, the current impact of the COVID-19 recession and the role of the cultural sector in recovery. To do so, this report considers the following areas for analysis:

- **Economic Contribution** of the Culture Sector
- **Business Environment** within the Culture Sector
- Cultural **Workforce**
- Cultural Sector's Impact on **Inclusive Growth**

This data pack has been prepared at a time of great economic uncertainty as a result of the COVID-19 crisis. This is an ever-evolving situation, with the economic future dependent on how easily the virus can be contained. As a result, caution should be taken over the data presented in this report, given the rapidly evolving situation.

1. Existing Characteristics of the Culture Sector (pre-COVID-19)

Our data analysis will first focus on New Anglia's cultural sector from a pre-COVID-19 position, to understand the sector's recent trajectory, strengths and weaknesses. Much of the economic data available from the ONS does not yet reflect the impact of COVID-19 (e.g. the latest BRES employment data from the ONS shows employment in September 2019), but is important in understanding the performance of the sector in recent years.

2. Current Characteristics of the Culture Sector (incorporating COVID-19)

To understand the latest position of New Anglia's culture sector, live metrics capturing the economic impact of lockdown have been incorporated. This can help to identify early trends catalysed by COVID-19 and identify emerging opportunities, challenges and changes within the economy and labour market. Building on the OBR reference scenario and applying it locally, can provide an estimate on local economic performance, in addition to wider data on ticketing, workforce indicators (e.g. job posting and take-up of furlough schemes), and business performance.

Sector & Geographical **Definitions**

Defining the Cultural Sector in New Anglia

The cultural sector in New Anglia encompasses a hugely diverse array of activities, including performing arts, museums, galleries, crafts and music, alongside heritage attractions.

Capturing all this activity through statistical definitions is challenging, as there is currently no internationally agreed definition. DCMS has developed a definition which best captures the breadth of activity within the sector, reflecting the availability of data on the standard industrial classifications (SIC). This definition is shown in the adjacent table, reflecting the sub-sectors which make up the wider culture sector.

In reality, the cultural sector has significant overlap with other sectors of the economy as demonstrated in the graphic in the bottom-right, with the cultural sector overlapping with the digital, creative industries and tourism sectors based on its definition.

DCMS Cultural Sector Sub-Sectors
Arts (Performing Arts, Artistic Creation)
Film, TV and Music
Radio
Photography
Crafts
Museums and Galleries
Library and Archives
Cultural Education
Heritage

Crossover between culture and other sectors (by definition)

1. Publishing, computer games, software publishing, computer programming, computer consultancy activities
2. Film, TV, music, radio
3. Heritage, retail of music / video recordings, manufacture of musical instruments, reproduction of recorded media
4. Heritage
5. Arts, museum activities
6. Renting sports goods, operation of sports facilities, other sport

Geographical Areas for Analysis

To enable the development of this economic data pack, data will primarily be analysed at the LEP, county and local authority geography (where appropriate). To enable a comparison with other areas, four comparable statistical geographies have been identified by the New Anglia Cultural Board:

- Kent (County)
- Lincolnshire LEP
- Humber LEP
- Coast to Capital LEP

Economic Contribution
of the Culture Sector

£ | **Culture's Role** within the New Anglia Economy

Culture plays an important role in supporting New Anglia's Economy…

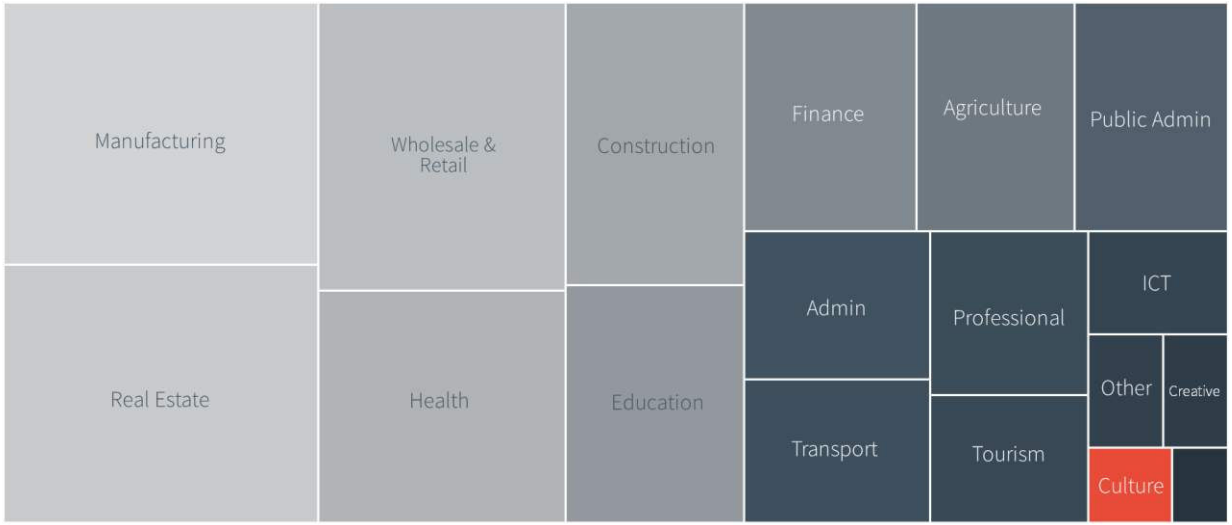
The culture sector in New Anglia accounted for almost £272million in GVA in 2018. The sector performs strongly on productivity (in terms of GVA per employee), ranking as the 7th most productive sector in New Anglia (£41,800) above wholesale and retail (£25,300) and the health sector (£26,100).

New Anglia's culture sector has experienced growth in recent years, growing by 16% since 2015 (+£38million). It has experienced the 4th highest growth in GVA over the last three years, only behind the accommodation and food (+20%), real estate (+18%) and construction (+17%) sectors.

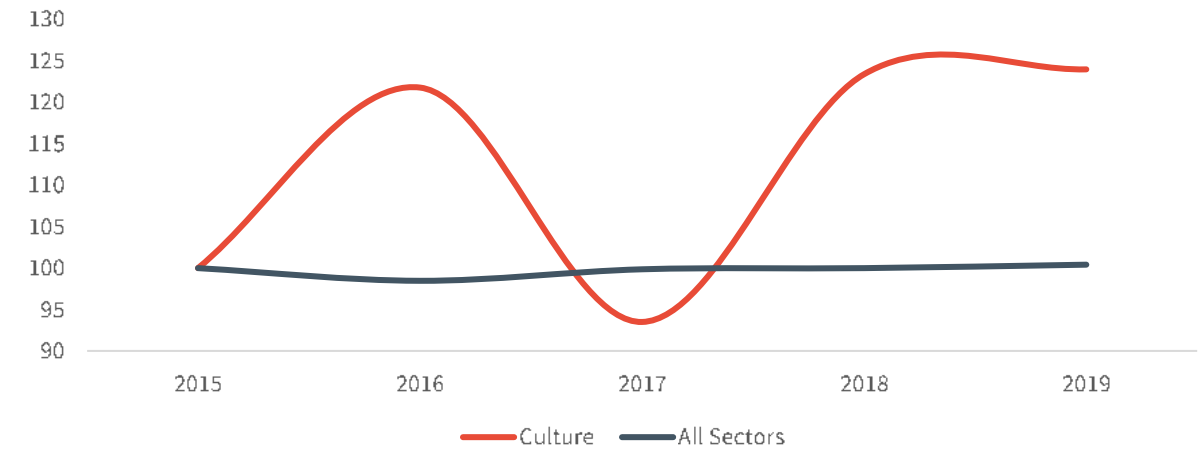
The culture sector plays an important role in providing employment for local people across New Anglia LEP. Almost 6,985 jobs are supported by the cultural sector, accounting for around 1% of all jobs in the area.

In March 2020 there are around 1,250 businesses that have been identified within the cultural sector, accounting for 2% of the overall business base.

GVA by Industry (£m), 2018



Employment by Industry, 2018 (Indexed 2015 = 100)



Source: ONS Sub Regional Accounts, BRES 2020, ONS Business Counts

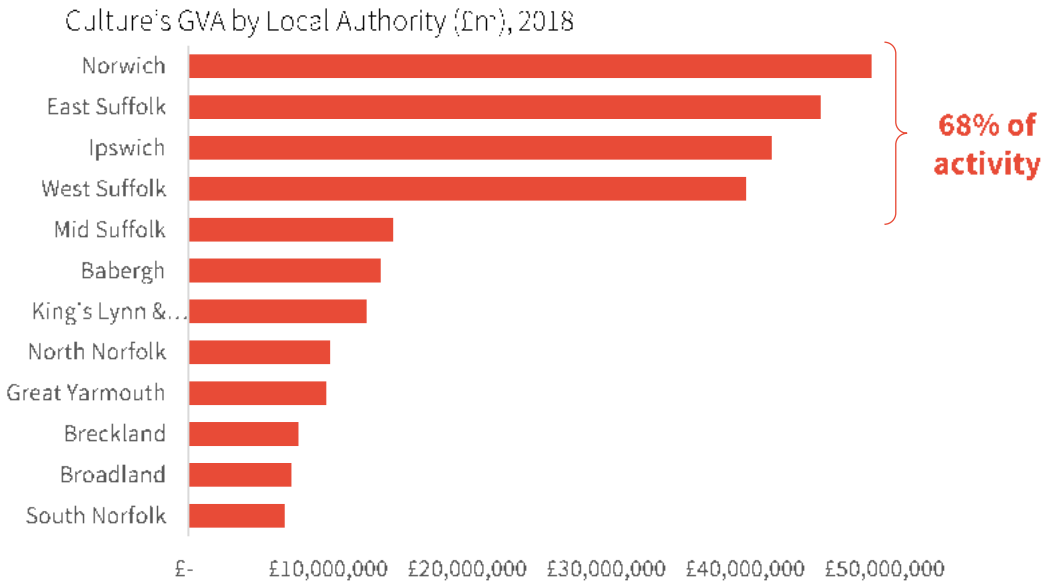
£ Concentration of activity within the Cultural Sector

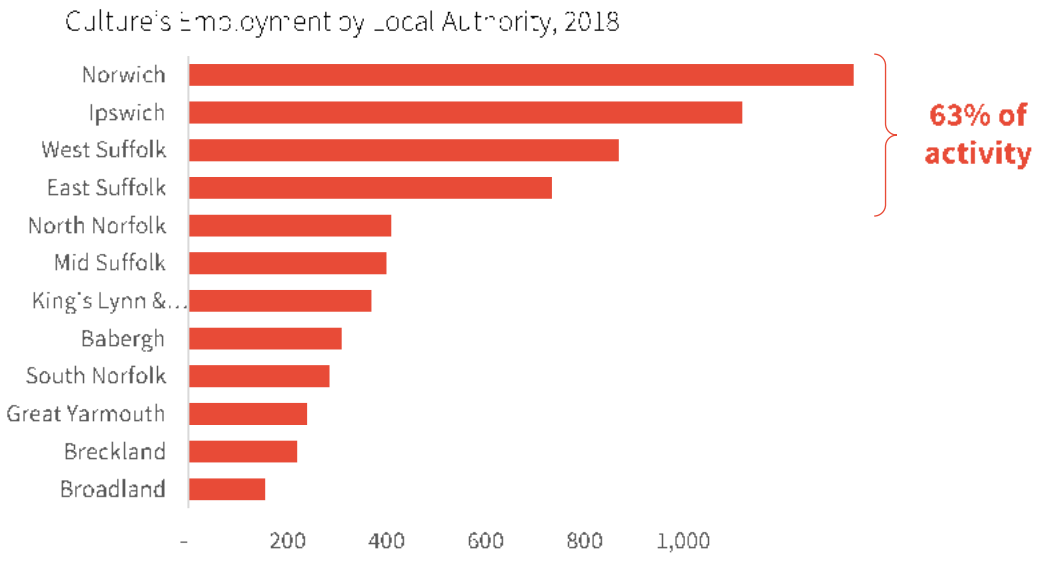
Cultural activity is largely concentrated in urban areas…

Cultural activity can be found across New Anglia, with the area home to a wealth of cultural activities and attractions. However, there are concentrations of activity, in terms of the GVA produced and the employment supported, with concentrations in Norwich, East Suffolk, Ipswich and West Suffolk, which combined account for around £177 million of GVA, or 68% of the cultural economy across New Anglia LEP.

New Anglia's cultural sector supports 6,985 jobs across 1,250 businesses. Concentrations of employment activity reflects the GVA pattern of production, with concentrations in with Norwich, Ipswich, West Suffolk and East Suffolk employing 3,950 people, accounting for 63% of all employment in the culture sector within New Anglia.

Further analysis on the employment structure and performance of New Anglia's cultural sector is provided in the Culture Workforce section.





Source: ONS Sub Regional Accounts, BRES 2020, New Anglia LEP Culture Board ,2020, Impact of COVID 19 on DCMS Sectors Submission

Role of Cultural Sector in supporting other sectors

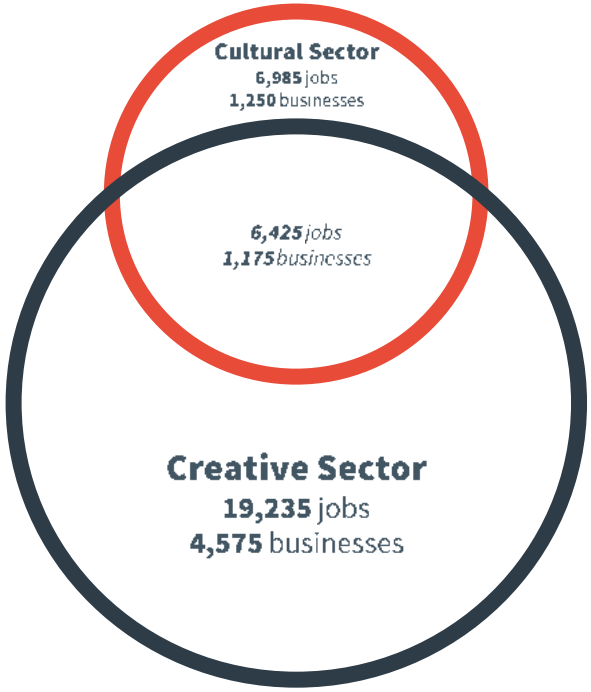
Culture plays an important role in supporting the wider creative industries…

The cultural and creative sectors have a strong overlap between them and are also critical to each other's vitality. Many of the activities in each sector appear in the other, with 92% of cultural employment in New Anglia also appearing in the DCMS creative sector definition.

The cultural sector plays a significant role in supporting the development of the creative industries, as highlighted through a recent Arts Council report which identified four major areas of impact:

- **Innovation**: arts and culture acts as an R&D lab for the creative industries, encouraging experimentation and in turn driving innovation and commercial activity.
- **Education:** arts and culture enables access to a rich and diverse education, preparing young people with the skills and creativity needed in a changing world of work.
- **Collaboration:** collaboration enables individuals and organisations to create new products and services outside of their established skillset and extend the value of their outputs.
- **Clustering:** the clustering of sectors within the creative economy creates an agglomeration effect, driving productivity through a supportive business environment.

Overlap of Cultural and Creative Employment & Businesses in New Anglia



Based on DCMS definitions

Creative Sector in New Anglia

15% employment growth in the last 5 years

0% business growth over last 5yrs

Source: BRES 2020, Arts Council & Metro Dynamics: The Impact of Arts & Culture of the wider Creative Economy, 2020

Role of Cultural Sector in supporting other sectors

Culture plays an important role in supporting New Anglia's Economy…

Tourism & Culture

There exists a strong relationship between the tourism and cultural sectors, particularly through the role of cultural tourism – in which the visitor's essential motivation to visit an area is driven through their motivation to learn, discover, experience and consume cultural attractions/products in a tourism destination.

New Anglia's cultural sector has a strong crossover with the tourism sector. 2,700 people are employed in the arts sector – providing a unique tourism offer for the area, which includes a variety independent art galleries. New Anglia is also home to a number of heritage, museums and craft assets, with more than 430 people employed across the sector. Major attractions include Blickling Hall and Estate, Framlingham Castle, Sutton Hoo, Museum of East Anglian Life, Royal Norfolk Regimental Museum and Lowestoft Maritime Museum.

The strong relationship between the tourism and cultural sector has been one of the most adversely impacted by the COVID-19 crisis, with restrictions on both tourism and cultural activities. The latest data from VisitBritain shows that there was a 76% decline in foreign tourists coming to the UK during 2020 with a slow recovery projected for 2021 for long-haul inbound tourism. Domestic tourism has also been impacted with domestic tourism spending and nights away down by 49% compared to 2019 levels.

Digital & Culture

Technology is increasingly breaking down the silos between the cultural sectors, blurring the lines between disciplines – theatres blends with film, computer programming merges with sculpture. There is an increasing array of digitalized cultural content, a trend which has been accelerated through the COVID-19 pandemic. Tech companies are increasingly collaborating with cultural organisations to create new experiences for audiences, often pushing the boundaries of technology at the same time.

Within New Anglia, there already exists a strong digital economy, and an increasing overlap between cultural and digital activities. Research shows that organisations who benefit most from digital technology are those who are digitally mature - where digital activity is embedded across an organisation as part of the strategic vision and throughout every part of the business, from its creative output and audience outreach through to e-commerce.

The Culture White Paper set out by the Government, has set out aspirations to make the UK of the world's leading countries for digitized public collections, with 61% of museums nationally having digitalized up to 50% of their collection. The are ambitions to improve audience participation through digital technology, enhance the skills and digital capability of cultural organisations and to unleash the creative potential of digital technologies.

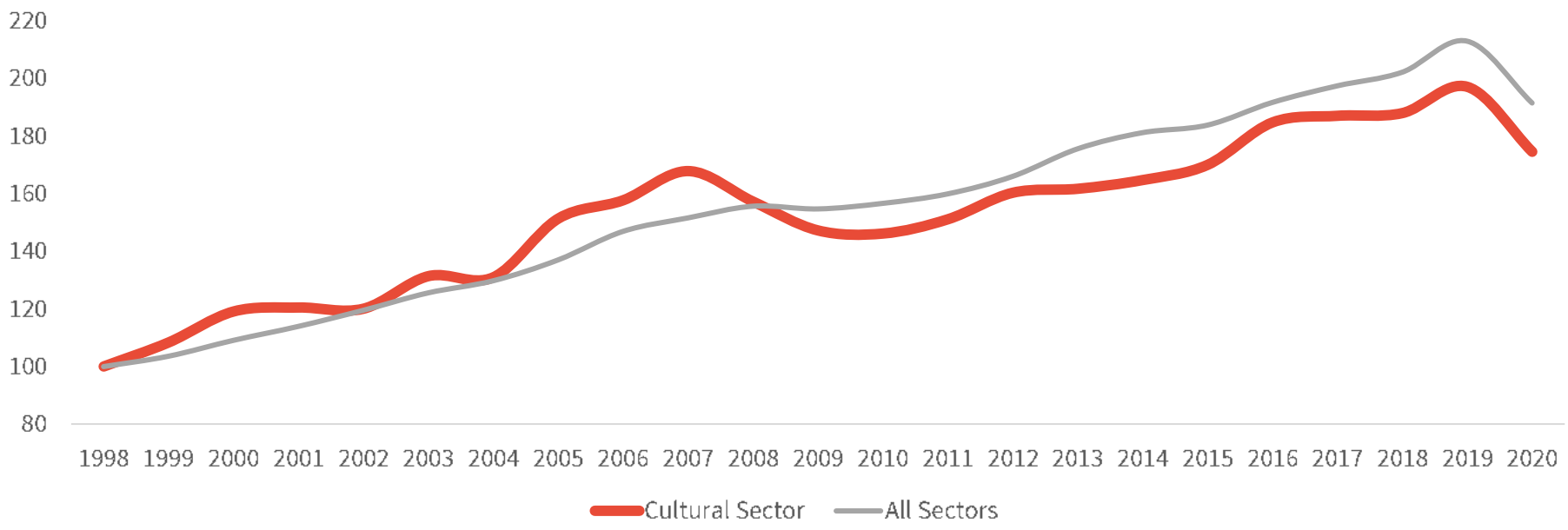
Source: BRES 2020, Arts Council & Metro Dynamics: The Impact of Arts & Culture of the wider Creative Economy, 2020

£ Recent Economic Growth within the Cultural Sector

The cultural sector has never fully recovered from previous recession…

The cultural sector in New Anglia has been growing in recent years, reflecting the employment growth experienced across the sector. However, its longer-term growth trajectory has lagged behind the rest of the economy, particularly since the 2007-09 recession, with New Anglia's cultural sector being significantly impacted, and taking 7-8 years to fully recover from the effects of the recession.

Culture's Nominal GVA compared to the rest of the Economy, New Anglia LEP (data indexed with 1998 = 100)



Source: ONS Sub Regional Accounts, BRES 2020, New Anglia LEP Culture Board ,2020, Impact of COVID 19 on DCMS Sectors Submission

Economic **Impact of COVID-19**

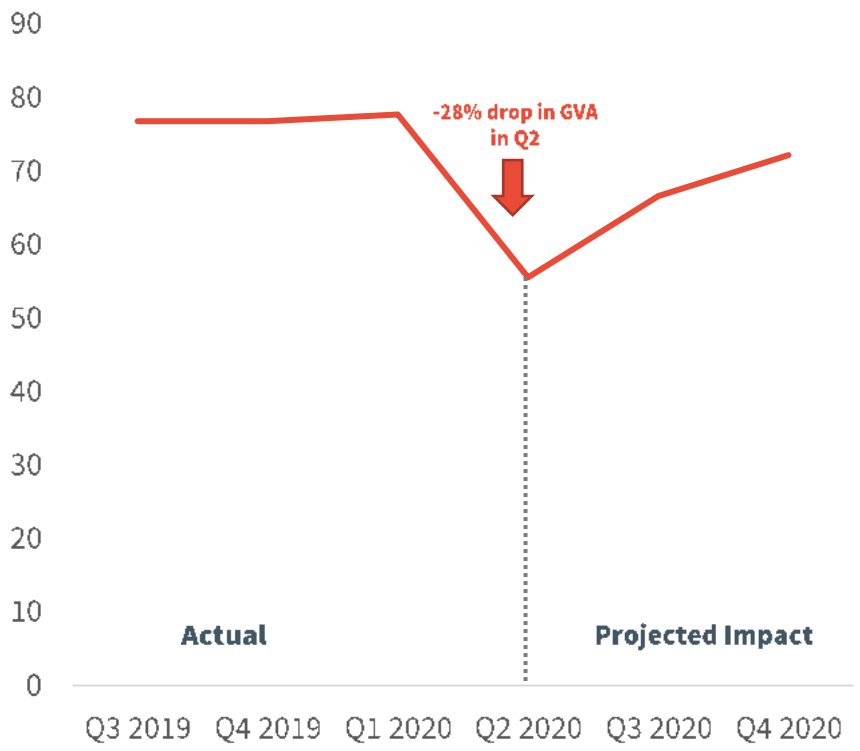
COVID-19 has impacted on cultural output, with estimates that the region will experience a 11% loss of output across 2020…

At this stage in the COVID cycle it is difficult to forecast the impact on GVA with any precision; there are simply too many unknowable factors. External estimates of the year-on-year impact of COVID-19 on GDP have ranged from a drop of 2.1% (KPMG) to a drop of 30% (Morgan Stanley). The Government's revised central scenario (as of November 2020, i.e. before the latest lockdown) is that the UK economy will contract by 11% in 2020.
Analysis by the Arts Council and the Creative Industries Federation in July 2020 found that the cultural sector is one of the most impacted sectors nationally, with cultural venues unable to open, or audience/visitor numbers being limited to adhere to social distancing guidelines.

Hatch have developed an impact model, to provide a central estimate of the impacts of COVID on the New Anglia economy. This combines the latest OBR and OECD evidence to produce a coronavirus reference scenario. Using this methodology, we have built a model that uses the OBR's revised sectoral impact estimates for Q2 2020 and rolled the loss rates out for four quarters on a decreasing basis to reflect the likely path of recovery. We have taken this approach to reflect the U-shaped recovery that most economists are now predicting.

During Q2 2020, we estimate that the cultural sector in New Anglia experienced a 28% contraction in GVA, resulting in an 11% GVA loss across 2020. This largely considers the impact of COVID up until September 2020, however does not consider the ongoing impact of restrictions in November 2020 and January 2021, which are expected to have an even greater impact on the cultural sector.

GVA impact of COVID on New Anglia's Culture Sector (Quarterly GVA £m in 2020 prices)



Source: Hatch analysis of OBR Reference scenario

Economic **Recovery Scenarios**

New Anglia's cultural sector will recover, but its future trajectory is unclear…

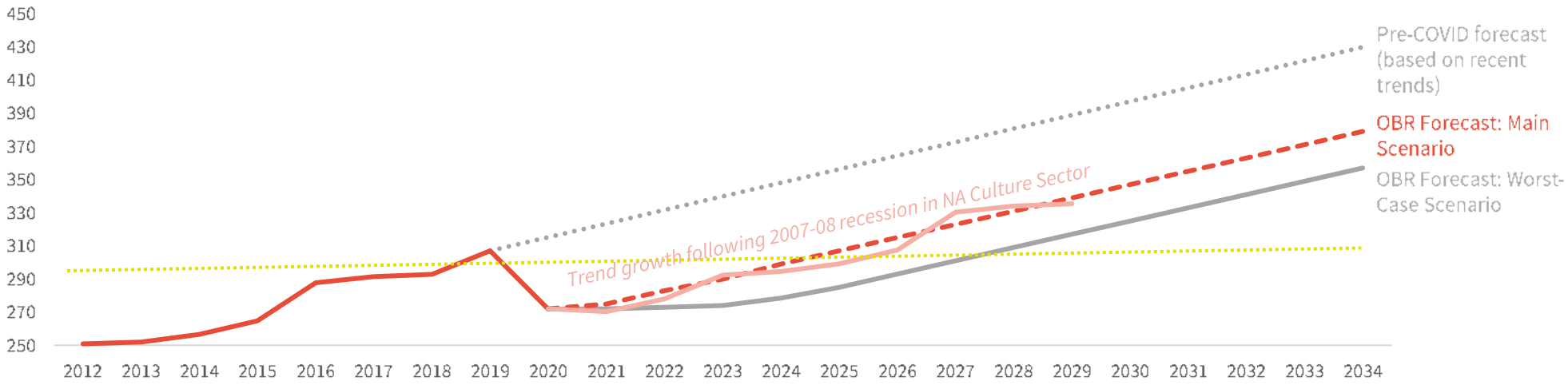
To show the potential economic growth scenarios for New Anglia's culture sector, we have created two scenarios (based on OBR projections) and compared this to the growth trajectory achieved following the 2007-08 recession by New Anglia's culture sector. The scenarios are based on the GVA projections shared in the OBR's latest Coronavirus update (November 2020), and incorporate evidence from:

1. OBR's November 2020 Central Scenario
2. OBR's November 2020 Downside Scenario

These are not forecasts, but give an indication of the growth rates required to both make-up for the 2020 GVA loss and return to similar growth rates. This means that sectors and businesses will need to be supported not just to recover, but to find new and innovative ways of producing output and increasing productivity. In addition, the GVA projections depend on how the economy rebounds from COVID-19, which is dependent on the vaccine rollout, consumer behaviour, wider economic conditions, the return of international tourism and the capacity of the sector to mobilise.

The scenarios show that the sector is significantly below its pre-COVID trajectory, with GVA expected to return to pre-COVID levels **by 2025** (based on a return to pre-COVID trend levels). This growth trajectory is very similar to that experienced following the 2007-08 recession. Under the OBR's worst-case scenario, GVA would not return to its pre-COVID trajectory until 2028.

New Anglia Recovery Scenarios (£m in 2020 prices – not indexed)



Source: Hatch analysis of OBR Reference scenario

Business Environment
within the Culture Sector

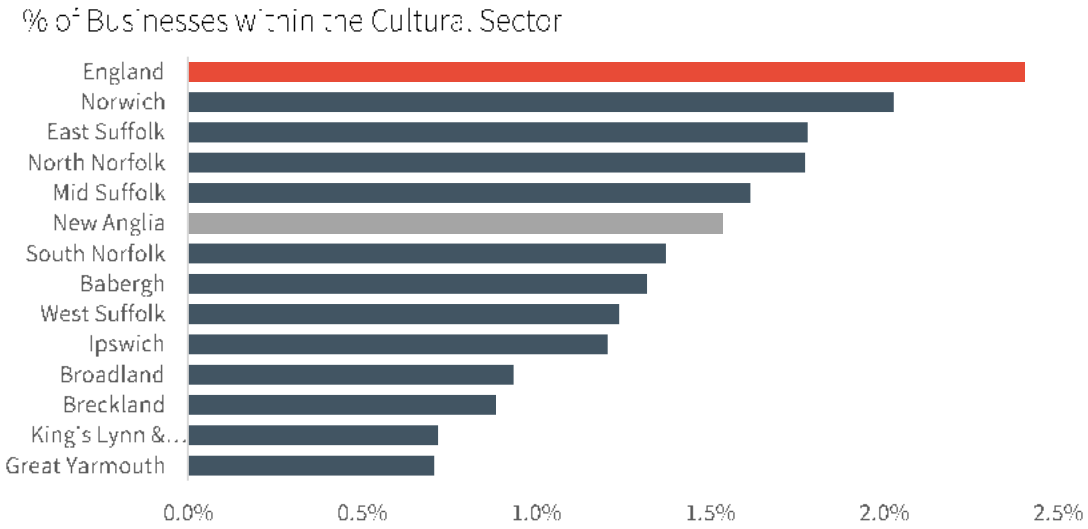
New Anglia's Cultural **Business Base**

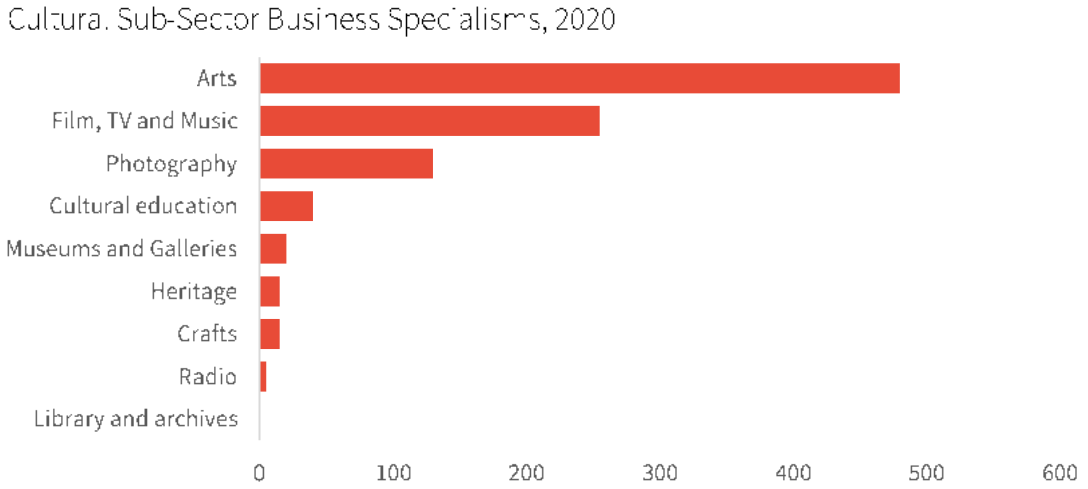
New Anglia's cultural business base is highly diverse and evolving…

There are 1,250 cultural businesses located in New Anglia LEP. This represents 1.5% of all businesses in the area, which is lower than the national average of 2.4%.

The proportion of cultural businesses varies throughout New Anglia LEP with Norwich having the highest proportion (2.0%), followed by East Suffolk and North Norfolk (both 1.8%), while Kings Lynn and West Norfolk and Great Yarmouth have the smallest proportion of cultural businesses (both 0.7%)

Within the cultural sector, New Anglia has specialisms within the arts sector, which accounts for 51% of all cultural businesses in New Anglia LEP, with the greatest concentration of Arts businesses located in East Suffolk (19%).





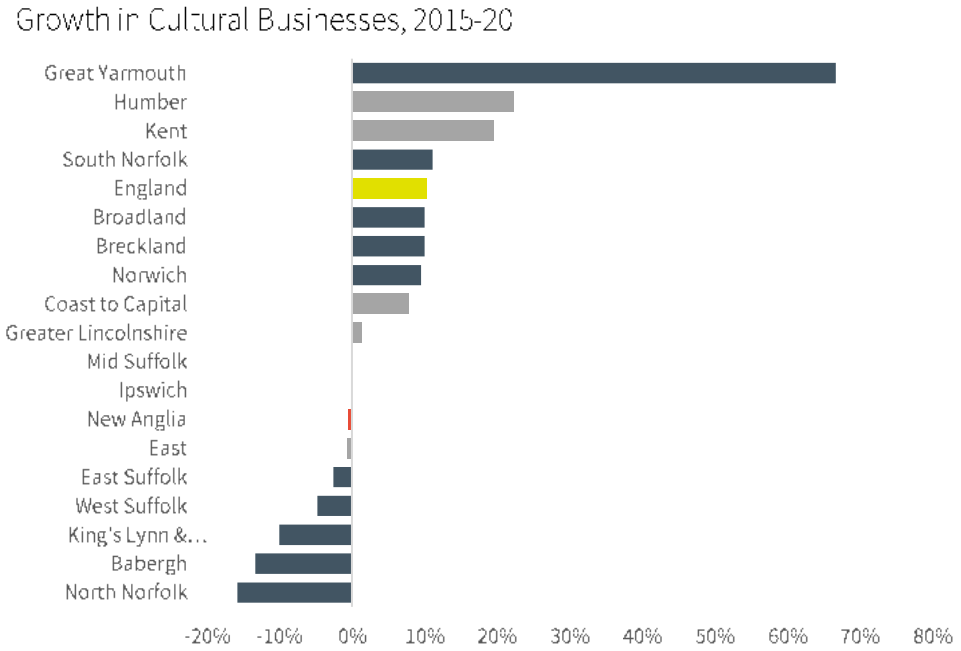
Source: ONS Business Counts

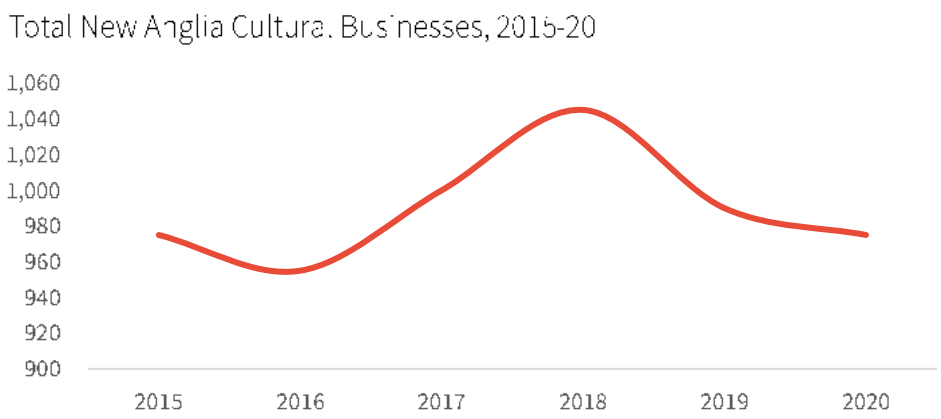
New Anglia's Cultural **Business Base**

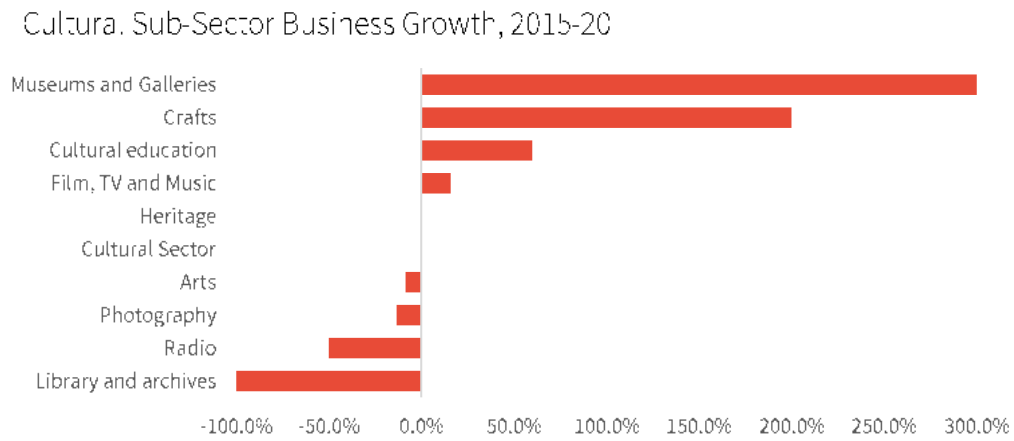
There are a fluctuating numbers of cultural businesses in New Anglia…

There was no growth in the number of cultural businesses in New Anglia over the period 2015 to 2020, which lagged behind the national trend (+10%) over the same period. Within this period, there was actually an increase of 7% between 2015 to 2018 before a return to 2015 levels in 2020.

Despite no overall increase in cultural businesses, there has been substantial growth in a number of culture sub-sectors, with the total number of craft businesses increasing by 200% and the total number of museum and galleries increasing 300% over the period 2015 to 2020. There has been a substantial drop in the number of library and archives businesses, however this reflects a small number of businesses within the sector (15 in New Anglia LEP).







Source: ONS Business Counts

New Anglia's Cultural **Business Base**

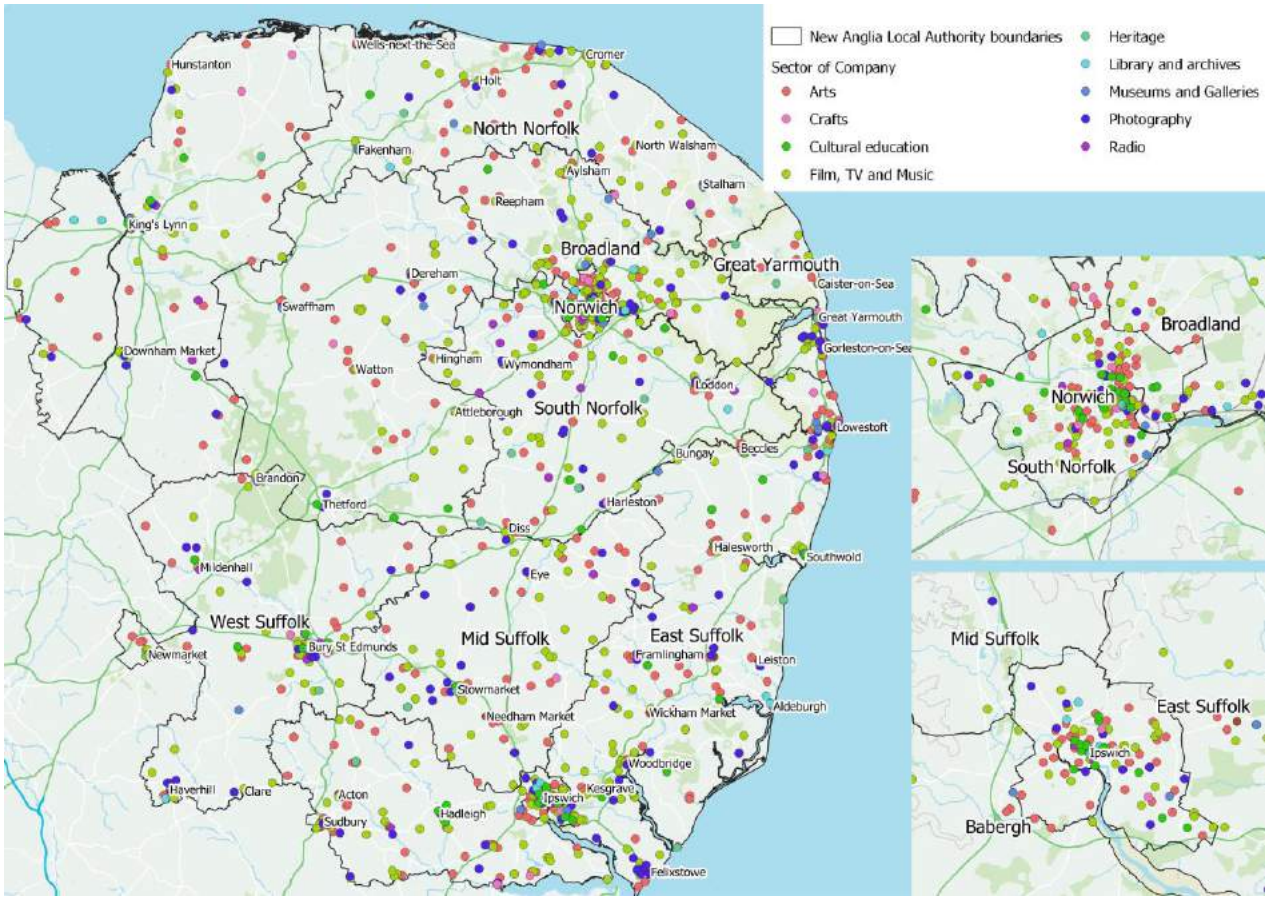
Concentrations of cultural activity around urban areas, with uneven distribution elsewhere…

The distribution of cultural businesses across New Anglia LEP is relatively uneven, with high concentrations surrounding the two main urban areas of Norwich and Ipswich.

There are also concentrations of cultural businesses along the eastern coastal shoreline, which is dominated by the sub sectors of photography and arts businesses around Great Yarmouth and Lowestoft.

It is unsurprising that there are a large number of cultural businesses located outside of the main urban areas with a high proportion of companies being micro size, and sole-proprietor. For these, there is less dependence on being located in close proximity to a large workforce.

Map of Cultural Businesses in New Anglia, 2020



Source: Companies House

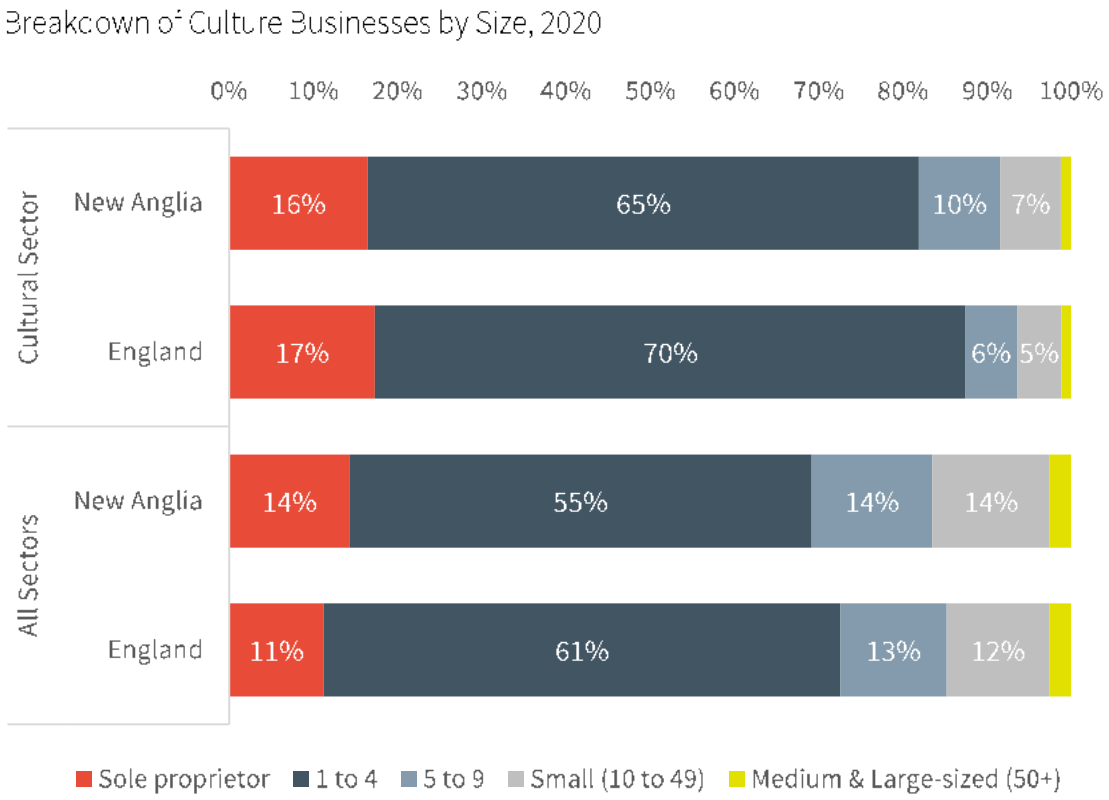
Business **Demography**

Almost all cultural businesses employ four or fewer people…

The majority of cultural businesses in New Anglia are micro businesses, defined as having fewer than 10 employees. Micro businesses account for 95% of the overall business base in New Anglia, which is in line with the national average (also 95%).

Of the micro businesses, the vast majority employ fewer than 5 people, and a substantial minority are sole proprietor businesses, accounting for one in 5 cultural businesses in New Anglia.

There are relatively few large cultural businesses within New Anglia, although this reflects the national picture. Only 7% of businesses employ between 10 and 49 employees, with fewer than 1% of businesses employing more than 50 employees. By comparison, more than 3% of businesses across the rest of New Anglia's economy employ more than 50 employees.



Source: ONS Business Counts

Arts Council Funding for New Anglia

Strong Arts Council investment into the area, being focused on Norwich and theatres…

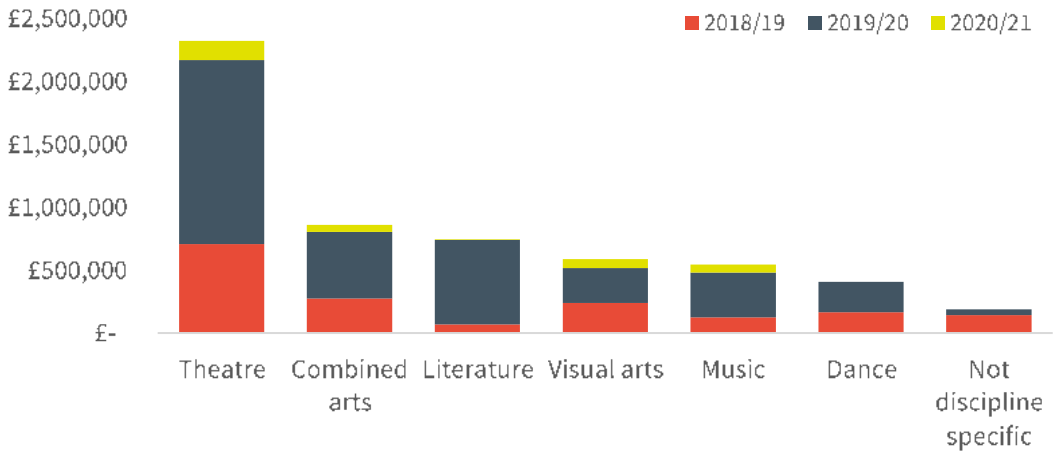
Data on investment into the cultural sector can be challenging to identify at a LEP-wide level. Data provided by the Arts Council in relation to its National Lottery Project Grants provides an indication as to activity across the sector. The Grants are an open access programme for arts, museums and libraries projects, supporting individual artists, community and cultural organisations across the UK.

Across the New Anglia LEP, more than £5.6million of funds have been received, with this peaking in 2019/20 (£3.6m). Much of this has been focused on Norwich (receiving 41% of funding between 2018 and 2020), with the two largest awards to UEA (£240,000) and Writers Centre Norwich (£238,605).

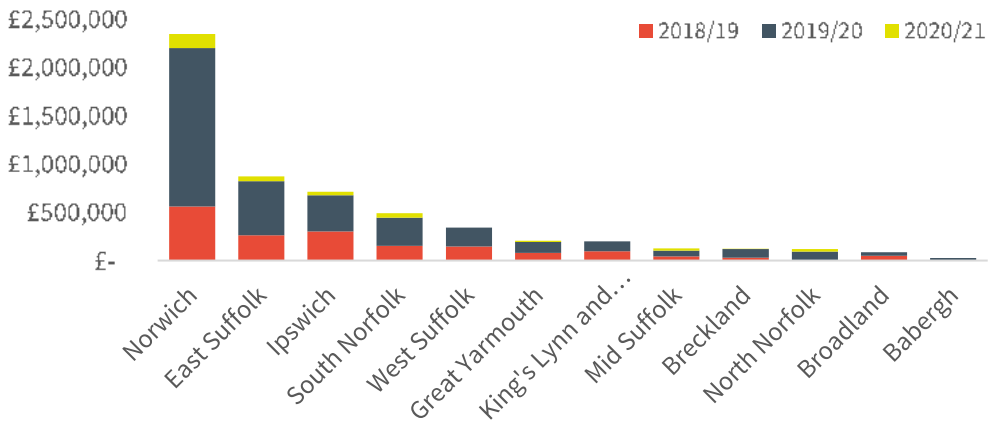
The distribution of funds across the area has been primarily focused on theatres, receiving 40% of all funding awarded in the region. Much of this has been awarded to individual productions or theatre groups engaging with local schools.

In addition to ***Arts Council National Lottery Funding***, the Arts Council Museum Accreditation scheme has awarded £3.4m over the last two years to support museums in New Anglia LEP. A large proportion of this funding was awarded to the Norfolk Museums Service.

Distribution of Arts Council National Lottery Funding by Sector



Distribution of Arts Council National Lottery Funding by Local Authority



Source: Arts Council Funding, 2020

National Lottery Heritage Funding for New Anglia

Strong National Lottery Heritage Funding investment into the area, being focused on Ipswich and Norwich…

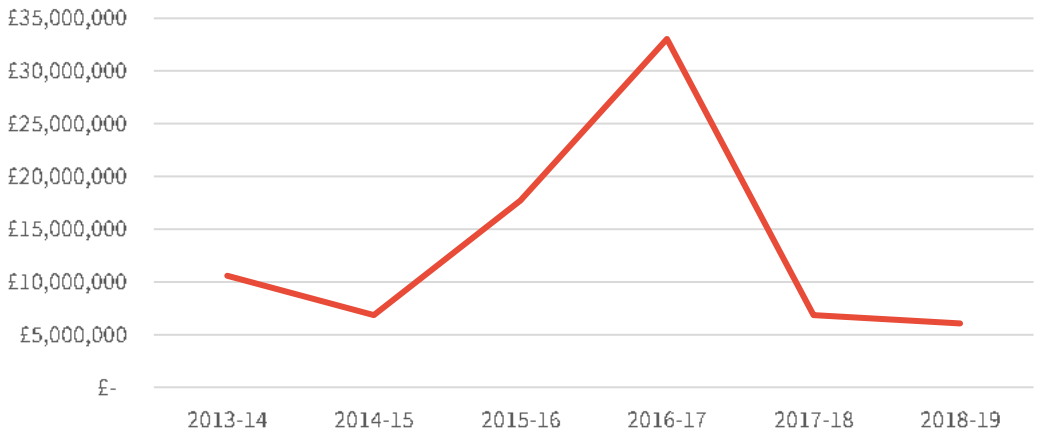
Using money raised through the National Lottery, the Heritage Lottery Fund (HLF) gives grants to sustain and transform the UK's heritage. Museums, parks, historic places, archaeology, natural environment and cultural traditions all receive investment.

Across the New Anglia LEP, more than £81.1million of funds have been received since 2013/14, with the highest level of funding being received in 2016/17 (£33m). Ipswich and Norwich have been in largest receipt of fund, and combined have accounted for 47% of all funding received.

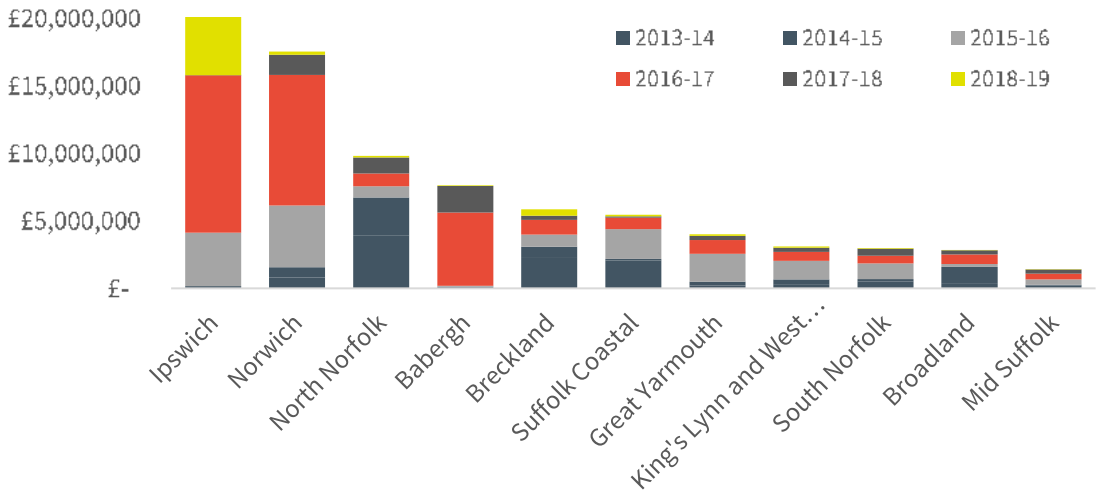
The largest recipients of funding over the last six years have been:

- 'The Hold': Suffolk Archives Service for the 21st Century, Suffolk County Council (£10.9m in 2016/17)
- Norwich Castle, Norfolk County Council (£9.2m in 2016/17)
- Ipswich Museum, Ipswich Borough Council (£4.7m in 2018/19)
- Gainsborough's House Society (£4.7m in 2016/17)
- Restoration of Broomhill Pool, Fusion Lifestyle (£3.6m in 2015/16

Distribution of National Lottery Heritage Funding by Year in New Anglia



Distribution of National Lottery Heritage Funding by Local Authority



Source: Arts Council Funding, 2020

Other Public & Private Sector Investment into the Sector

Wider investment across the sector supports the development of the sector across New Anglia…

Local Authority Funding

Funding from local and regional government helps to support the development of the cultural sector in New Anglia. One source of funding, is spend from Norfolk and Suffolk County Councils, particularly in the form of arts grants to support local cultural infrastructure, activities and strategic networks. Much of the investment from local councils helps to support libraries, museums and local theatres, and this is a critical part of the overall investment ecosystem into the cultural sector.

Private Sector Investment

Cultural organisations often operate using a mixed economy model, using both public and private funding sources. With public sector funding holding a large opportunity cost, the role of private sector investment in culture is increasingly important. Data relating to private sector investment is patchy, and so a range of different data sources have been used to highlight the types of private sector investment available, and the scale of this investment (where this information is available).

In 2019, Arts Council England commissioned a survey on private investment in culture , the first since the 2011/12 survey by Arts & Business. The ACE survey had 887 responses from arts and culture organisations across England. It reported a total of £545m worth of private investment in arts and culture in 2017/18, with 91% of arts and culture organisations receiving some form of private investment in 2017/18. This value has increased by 8% between 2015/16 and 2017/18. However, in the last year of that period there has been limited growth, which is in line with trends across the wider charitable sector.
The survey also found that individual giving is the largest form of private sector investment, accounting for 43% of private investment in arts and culture in 2017/18 compared to 38% from grants from trusts and foundations.

Visual arts organisations received the largest proportion of private investment (27% of total investment), followed by museums (23%) and music organisations (18%). Literature and Dance received the least amount of private investment with 2% and 3% respectively.
New Anglia falls into the Arts Council's South East region for the regional analysis.

The South East area as a whole received 10% of the total private investment in 2017/18, accounting for 10% of total income for the sector. Arts and cultural organisations in the Midlands received £54m, of which 43% came from individual giving, 40% from Trusts and Foundations, and 17% from businesses.

Source: Funding Data provided by Norfolk and Suffolk County Councils, 2020

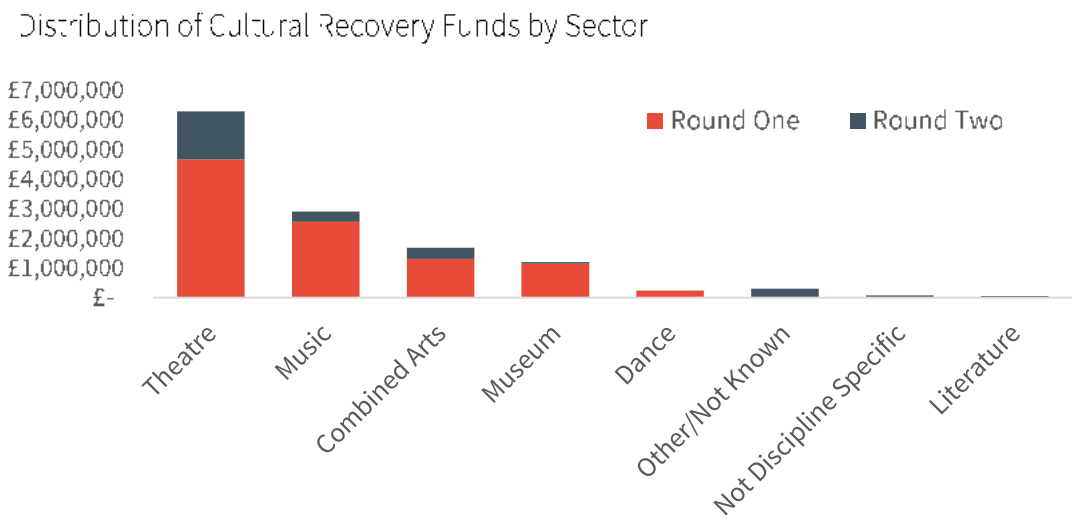
Government Support for COVID-19

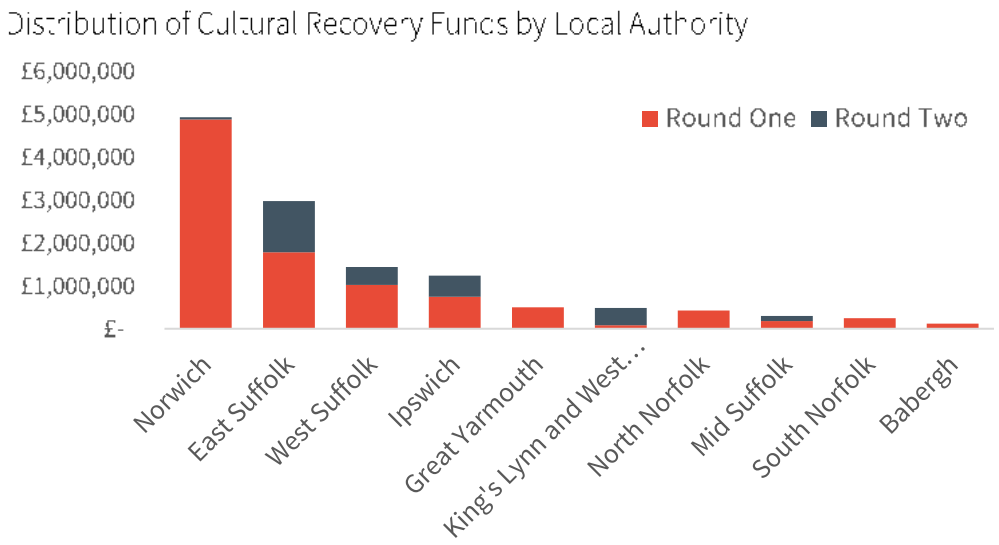
Government support has been received, but does not cover full financial impact of the crisis…

New Anglia's cultural businesses have received support from the Government, however this has been relatively limited and has not made up for the shortfall in incomes expected to be received this year. A range of support has been offered, including employment support (e.g. Coronavirus Job Retention Scheme and Self-Employment Income Support Scheme, which is considered in the following chapter), VAT reduction from 20% to 5% for tourism and hospitality firms and funds received through the Cultural Recovery Fund.

To date, the New Anglia LEP area has received £12.6m in Cultural Recovery Funds, which includes separate pots of funding from the Arts Council, BFI and Historic England.

The largest recipients in the New Anglia LEP includes Norwich Theatre (£3m), Snape Maltings (£950k), Spa Pavilion (£746k), Ipswich Regent Theatre (£488k) and Norfolk Museums (£456k).





Source: Cultural Recovery Fund, Arts Council & DCMS, 2020

New Anglia's Performance Relative to Comparators

New Anglia has performed well relative to comparator areas in attracting investment

New Anglia has done well in attracting public sector cultural investment into the area. The area has attracted £67.0m of National Lottery Heritage Funding between 2013 and 2019, equalling £48.60 per person. This outperforms all of the comparator areas on a per capita basis.
New Anglia has also done well in receiving support through the Cultural Recover Funds, receiving £12.6m, equating to £7.58 per capita. This also outperforms all the other comparator areas.

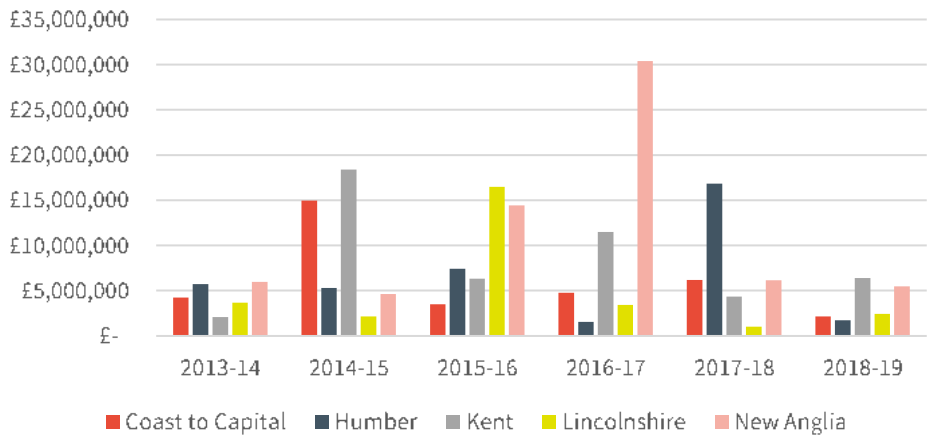
Distribution of Cultural Recovery Funds Relative to Comparator Areas

	Total CRF Funding Received	Population	**£ CRF Per Capita**
Coast to Capital	£8.9m	1.6m	**£5.71**
Humber	£3.7m	0.9m	**£4.07**
Kent	£7.4m	1.6m	**£4.67**
Lincolnshire	£3.2m	1.1m	**£2.94**
New Anglia	**£12.6m**	**1.7m**	**£7.58**

Distribution of National Lottery Heritage Funding to Comparator Areas

	Total Funding Received (2013-19)	**Total Funding Per Capita**
Coast to Capital	£35.8m	**£22.95**
Humber	£38.5m	**£41.29**
Kent	£49.0m	**£30.97**
Lincolnshire	£29.1m	**£26.67**
New Anglia	**£81.1m**	**£48.60**

Distribution of National Lottery Heritage Funding by Comparator Areas



Source: Arts Council Funding, 2020

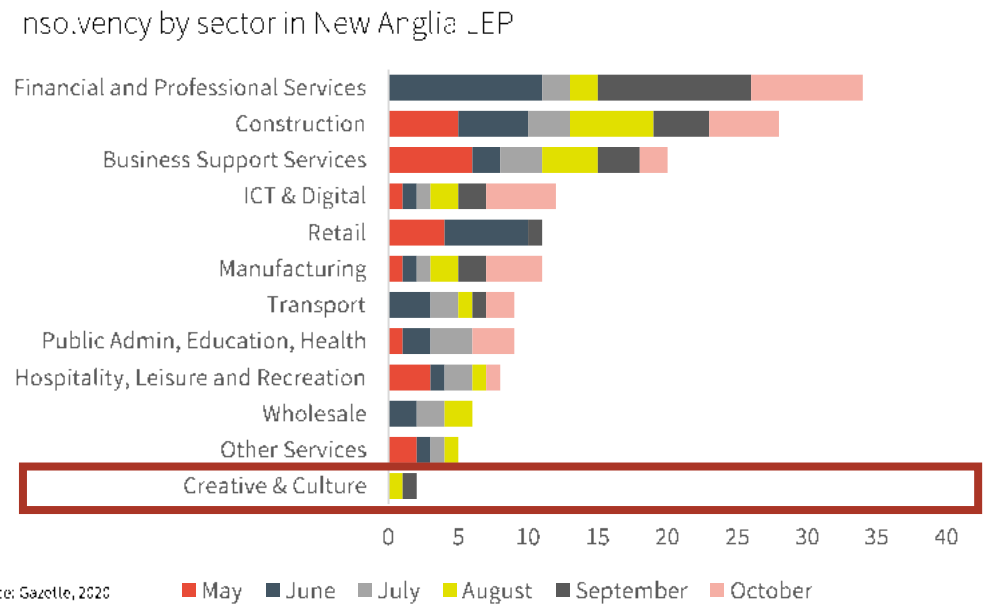
Corporate **Insolvencies**

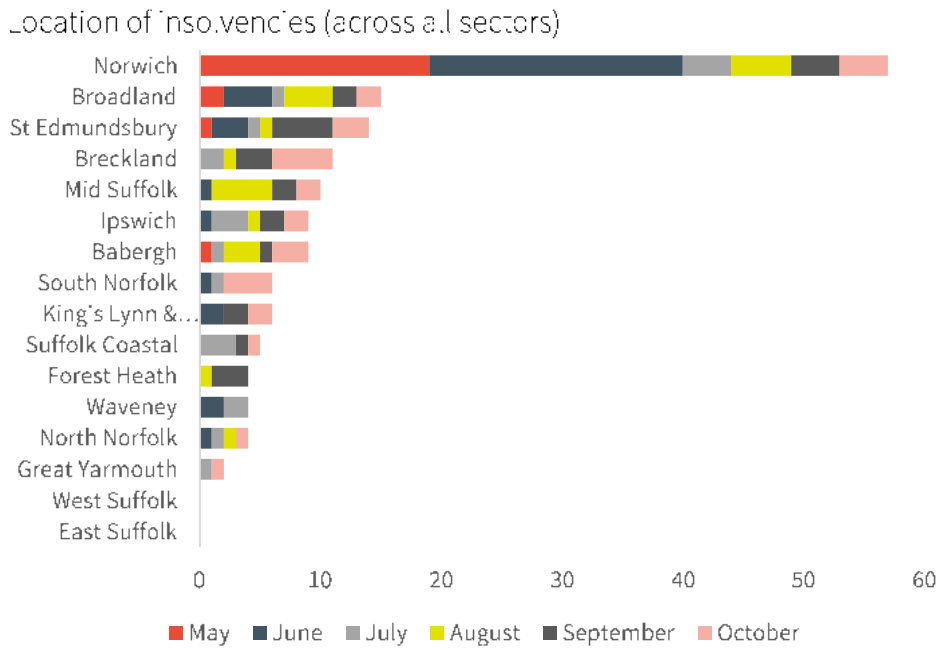
Increased corporate insolvencies in several of the worst-hit sectors...

The Gazette provides an official public record of business insolvencies: instances where businesses can no longer meet their financial obligations. Using Companies House data to match Gazette records, analysis shows that 23 companies were declared insolvent or liquidated in May compared to 36 in June, 20 in July, 22 in August, 25 in September and 30 in October. This is above the average of 4-5 for previous months before COVID. The largest proportions of insolvencies were in Norwich (37%), which was comfortably the highest with Broadland suffering the second highest number of insolvencies (10%).

The highest number of insolvencies were registered by businesses operating in Financial and Professional services; Construction, Business Support Services; and ICT & Digital. There is a risk that this could rise significantly as government support schemes targeted at the worst affected sectors are wound down. Encouragingly, the Creative sector remained relatively resilient to date with 2 insolvencies since May.

There have been zero insolvencies recorded within the culture sector in New Anglia since May, while nationally there have been almost 100 insolvencies within the sector since May, with insolvencies increasing monthly since August reaching its greatest level of insolvencies in October (25).





Source: Gazette, 2020

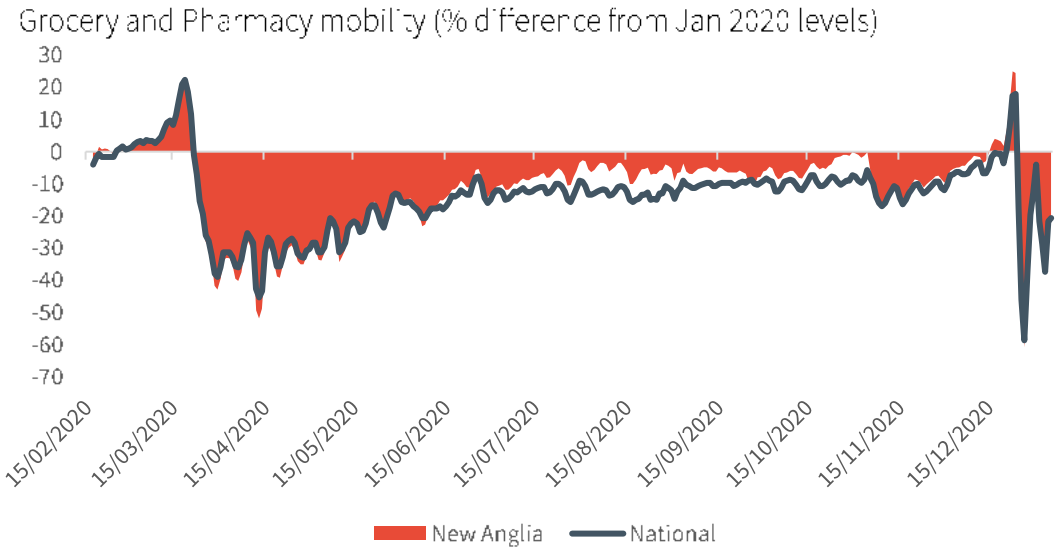
Movement and **Mobility**

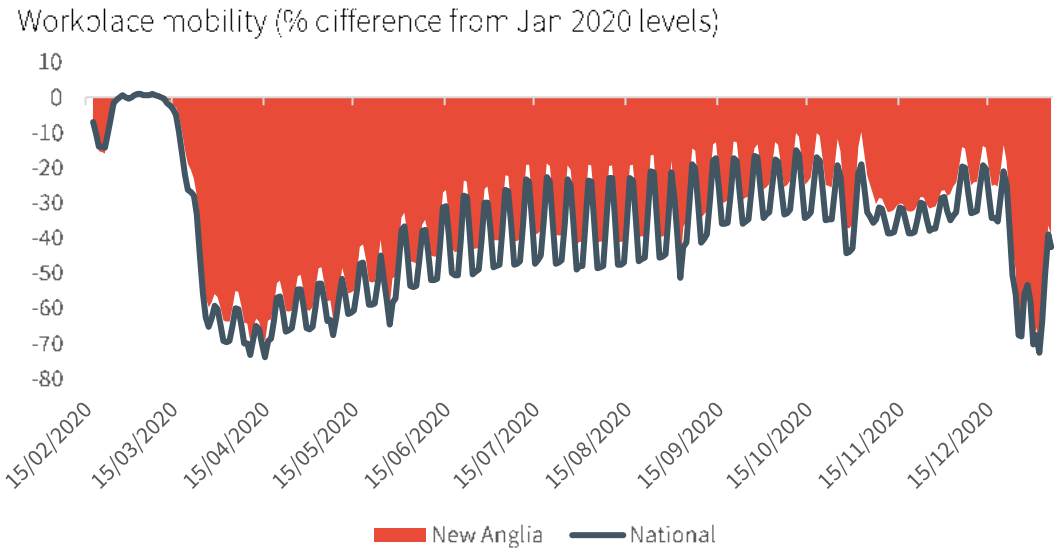
Mobility is slowly returning to New Anglia's pre-COVID baseline as restrictions are eased…

Business activity within New Anglia's cultural sector has been significantly impacted by lockdowns imposed on the population, leading to the closing of cultural venues and workplaces.

Since February 2020, Google has recorded the daily movements of people to track the effects of lockdown on mobility. The mobility statistics are measured against a baseline of 0, which is the median mobility value from the five-week period before COVID (3 January – 6 February 2020). Although data isn't available for cultural venues, it does provide an indication on the impact of COVID-19 specifically in the New Anglia area across a range of activities. Those of most relevance to the cultural sector are grocery & pharmacy and workplace activities, as shown in the adjacent graphs.

Data shows that, since the 1st lockdown, areas within New Anglia have seen similar mobility patterns compared to the national average for grocery and pharmacy shopping and workplaces. However, the return to Grocery and Pharmacy mobility in New Anglia was experienced at a more rapid rate in August and September and exceeded pre-Covid levels, before decreasing to around -20% mobility. The 2nd and particularly the 3rd lockdown in January 2021 has seen a return to similar levels of mobility as in the 1st lockdown.





Source: Google Mobility

Cultural **Workforce**

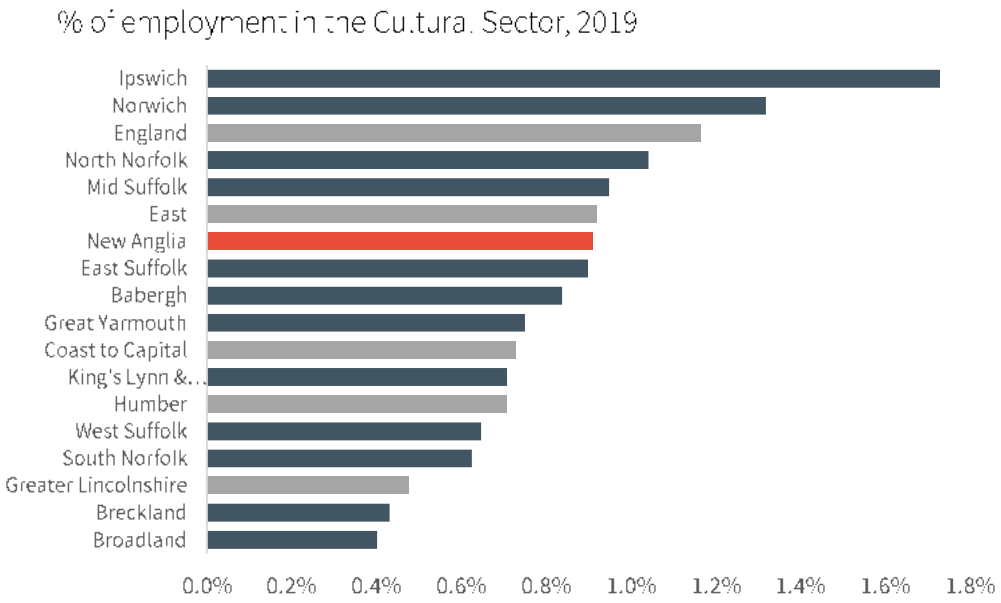
Employment within the Cultural Sector

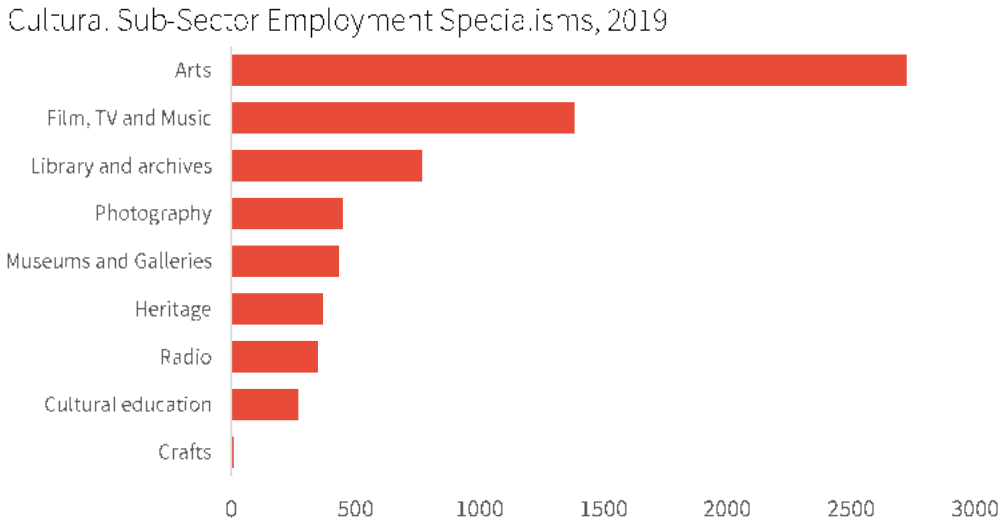
Concentrations of cultural employment in urban areas…

There are approximately 6,985 jobs in the cultural sector in New Anglia LEP. This accounts for 1% of all employment in New Anglia, which is higher than all the comparator regions of Coast to Capital (0.7%), the Humber (0.7%) and Greater Lincolnshire (0.5%) as well as both the regional and national averages (0.9% and 1.2% respectively). The highest concentration of employment activity is in Ipswich and Norwich where cultural activity accounts for 1.7% and 1.3% of all jobs respectively.

New Anglia has a number of particular sub-sector specialisms in the cultural industry. This includes the arts sector, which accounts for around 42% of all cultural employment in New Anglia LEP, and the film, tv and music industry, which accounts for 21%.

Sub-Sector	Number of Jobs	LQ (Specialisation) relative to England
Arts	2,725	0.9
Film, TV & Music	1,385	0.5
Library & Archives	770	1.1
Photography	450	0.9
Museums & Galleries	435	0.6
Heritage	370	1.0
Radio	350	1.0
Cultural Education	270	1.3
Crafts	10	0.2





Source: BRES 2020

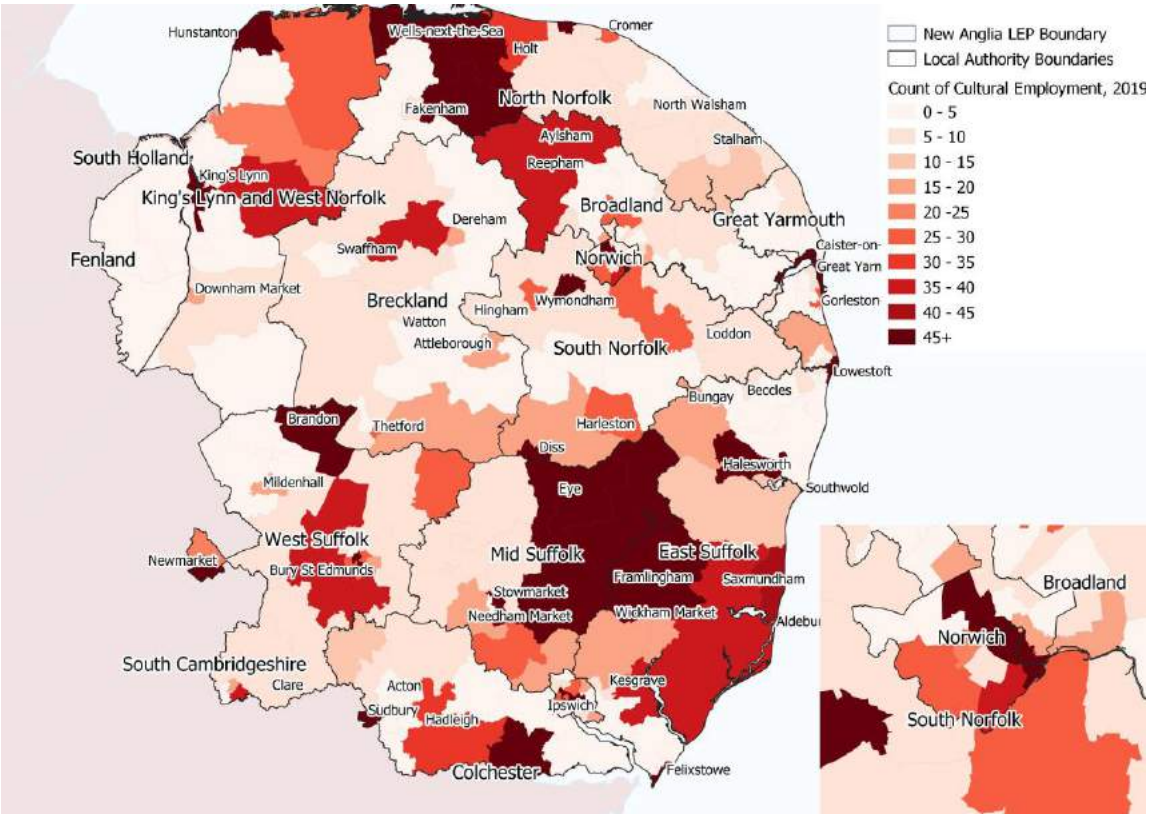
Employment within the Cultural Sector

Cultural employment is spread across New Anglia LEP

To understand local hotspots of employment, the adjacent heat map highlights areas where there are strong concentrations of cultural employment. The highest concentration of employment are found in urban areas (including Norwich, Ipswich, King's Lynn, Great Yarmouth, Bury St Edmunds and Lowestoft), in Mid Suffolk and East Suffolk.

Although the core urban areas in New Anglia LEP host much of the cultural employment, it is clear that there is a spread of employment across the area, with concentration of activity in more rural locations (including around Brandon, Wells-next-the-Sea, Eye and Wymondham).

Map of Cultural Employment in New Anglia



Source: BRES 2020

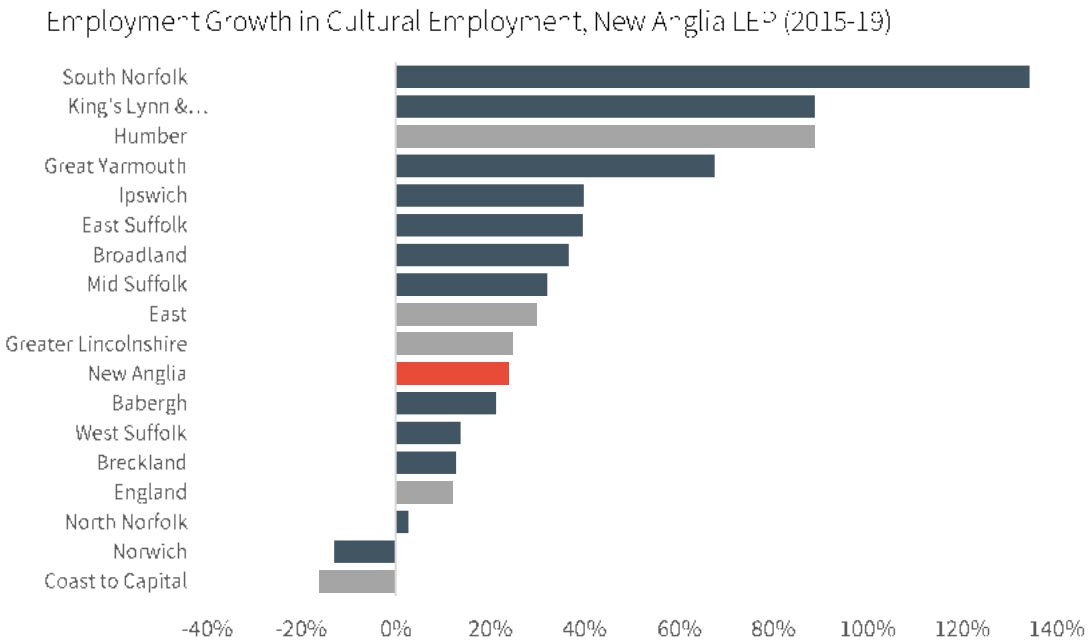
Employment Growth within the Cultural Sector

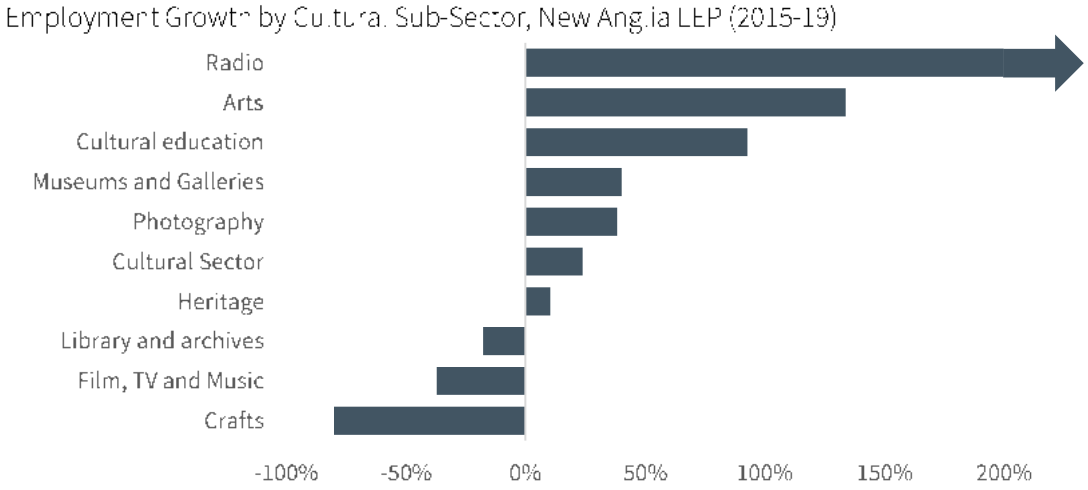
Culture is an employment growth sector in New Anglia over the last few years…

Over the period 2015 to 2019 the culture sector in New Anglia has experienced substantial growth in overall employment, increasing by 24%. The growth that the sector has experienced is double the rate experienced at the national level (+12%) but is lagging behind the East region's growth of 30%.

At a local level there have been varying levels of growth within the sector, in particular three local authorities experiencing a growth of over 60% which were Great Yarmouth, Kings Lynn and West Norfolk and South Norfolk (68%, 89% and 134% respectively).

The cultural sub sectors have experienced differing growth over the period 2015 to 2019 in New Anglia, with only 3 sub sectors experiencing a decline in employment. There has been exceptionally strong growth in the Radio sector, growing from 25 people in 2015 to 350 people in 2019. In comparison, the library and archives, film, tv and music and crafts sectors have all experienced a decline in overall employment figures (-18%, -37% and -80% respectively).





Source: BRES 2020

Characteristics of Cultural Sector Employment

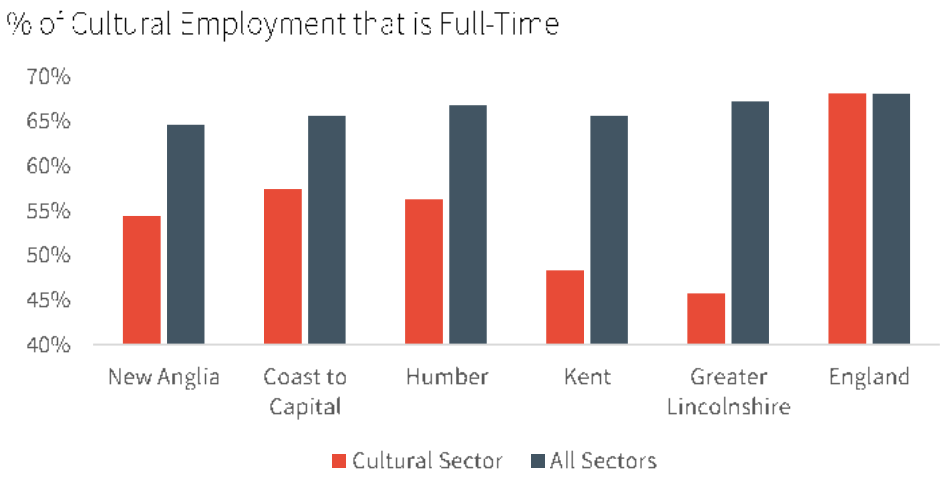
A higher proportion of New Anglia's cultural workforce work part-time and are either 16-24 or 50+

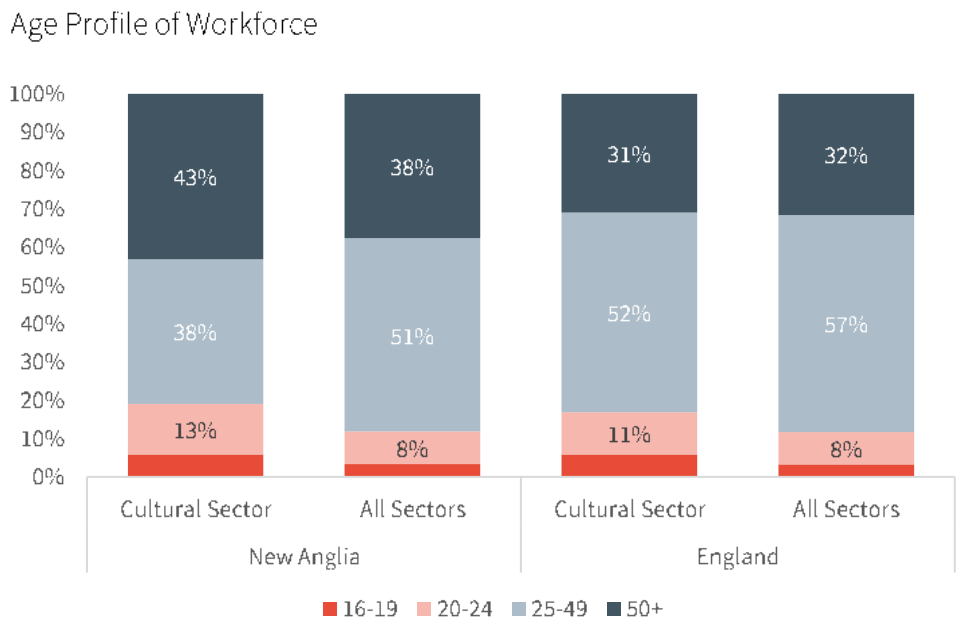
When analysing the workforce of New Anglia's cultural sector, there are a number of key characteristics within the data.

Within New Anglia's cultural sector, 54% of workers are full-time, compared to 64% across the rest of the economy. This partly reflects the seasonal nature of some cultural employment, and the age profile of those working within the sector. The level of full-time working in New Anglia's cultural sector is 10% lower than for England, suggesting that the sub-sector make-up of the sector also impacts on the level of full-time work available.

The cultural sector has a much higher proportion of people aged between 16 and 24 (accounting for 19% of the workforce) and over 50 (accounting for 43% of the workforce) compared to the rest of the economy and the national picture. The sub-sector composition of the sector in New Anglia may partly explain this along with its more seasonal nature.

Relative to New Anglia's LEP comparators, New Anglia has a higher proportion of full-time workers in the cultural sector relative to Kent and Greater Lincolnshire, but a lower proportion relative to Coast to Capital and the Humber LEP.





Source: BRES 2020

Earnings within the cultural sector

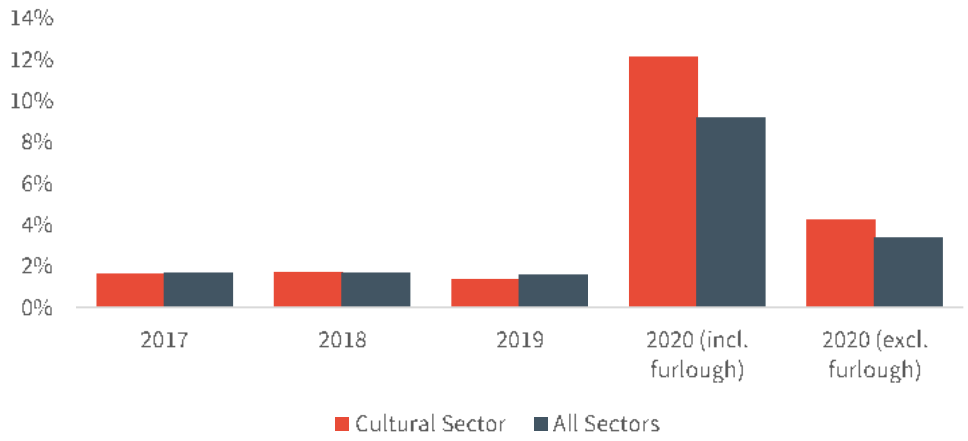
Earnings within the cultural sector are high, but lower than nationally…

Average earnings for New Anglia's full-time workers in the cultural sector are 16% higher than across the rest of the economy, with the average full-time worker in the cultural sector earning £26,700. Relative to the national level, workers in New Anglia's cultural sector currently earn 10% less than the average national cultural wage, which is a comparable wage gap to that experienced across the rest of the economy, reflecting the prevailing economic conditions locally rather than a structural effect particularly on the local cultural sector.

Data relating to the proportion of workers earning lower than the national minimum wage shows that the cultural sector nationally generally performs well, with less than 2% of workers earning below the national minimum wage in 2017-19. However, the impact of COVID-19 can clearly be seen in 2020, particularly the strong impact on the cultural sector, with more than 13% of the cultural workforce nationally now earning less than the national minimum wage (when incorporating those on currently on furlough). COVID-19 has strongly impacted on the cultural workforce, more so than across other sectors of the economy.

Median Annual Earnings by Sector for full-time workers (2019)

% of Workers Earning Lower than National Minimum Wage



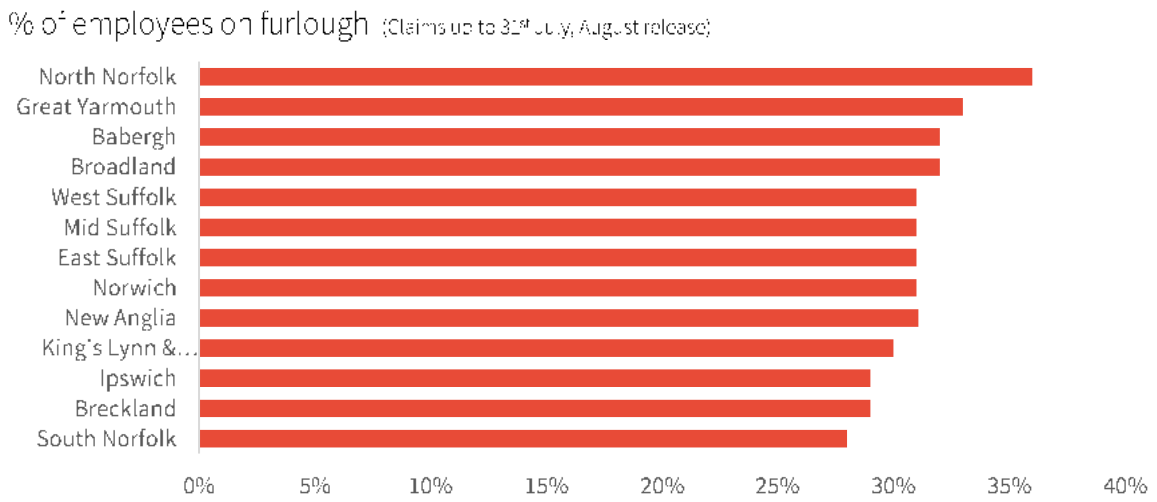
Source: ASHE, LSE, IFS

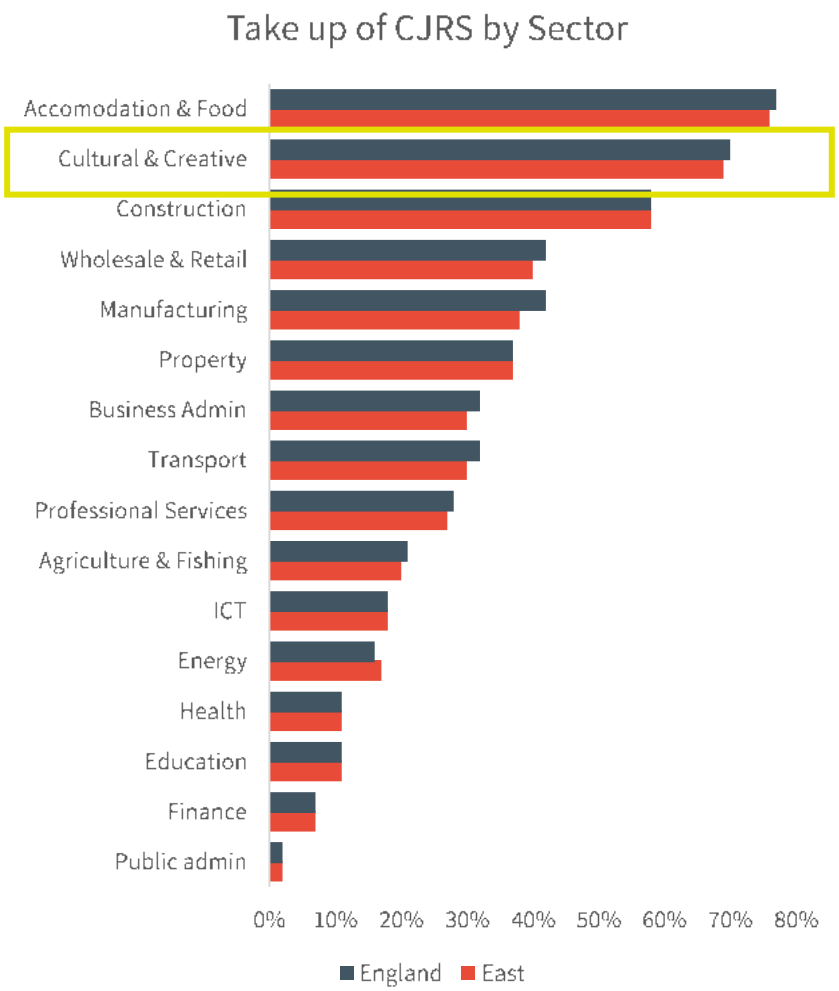
Claimant **Count and Job Retention Scheme**

Large increases in overall claimant count despite almost a third of all employees being on furlough…

Businesses across New Anglia in all sectors have furloughed 31% of all employees. Uptake of the Coronavirus Job Retention Scheme (CJRS) has been highest in North Norfolk with 36% of all employees on furlough. The greatest claims of CJRS in the East of England have been from the accommodation and food services and arts and entertainment industries and the construction sector (76%, 69% and 58% respectively), all of which have been hard hit by COVID-19.

Despite this strong uptake of government support – this has yet to prevent redundancies as indicated by the uptake in Claimant Count between March and May 2020 where it increased by 113% across New Anglia LEP. However, the claims have reduced by 7% between May and October 2020 across New Anglia, indicating that the rate of redundancies is reducing.





Source: ONS Claimant Count, Coronavirus Job Retention Scheme Statistics

Self Employment

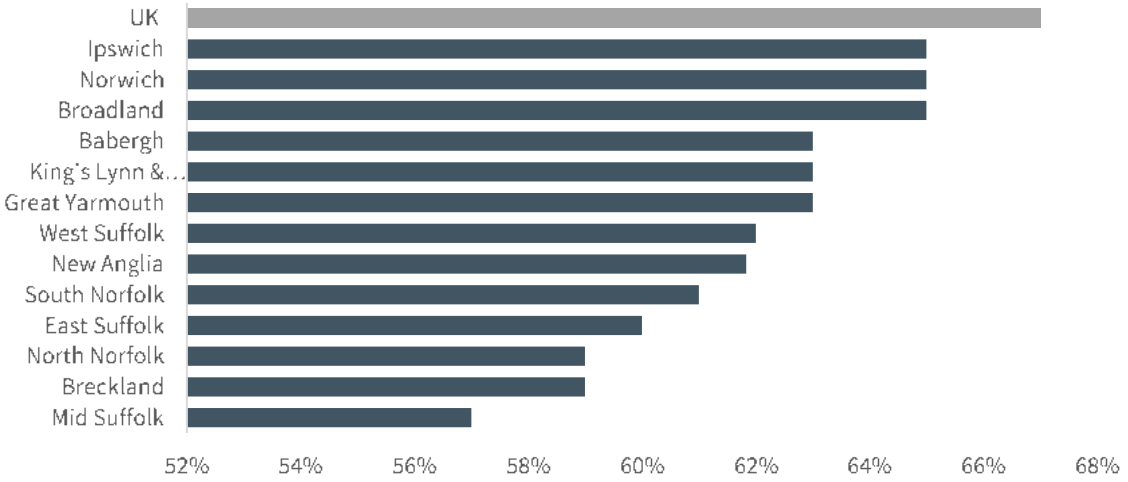
Above average levels of self employment…

Data on self-employment in the cultural sector is not available at the New Anglia LEP level, and so the wider economy picture has been presented, with recognition that a higher proportion of workers in the cultural sector are typically self-employed. There are almost 105,000 people across New Anglia LEP who are self-employed. This represents 11% of working age adults, which is just above the national average. Whilst the levels of self-employed are relatively low for the LEP, it is very high in North Norfolk (23%).

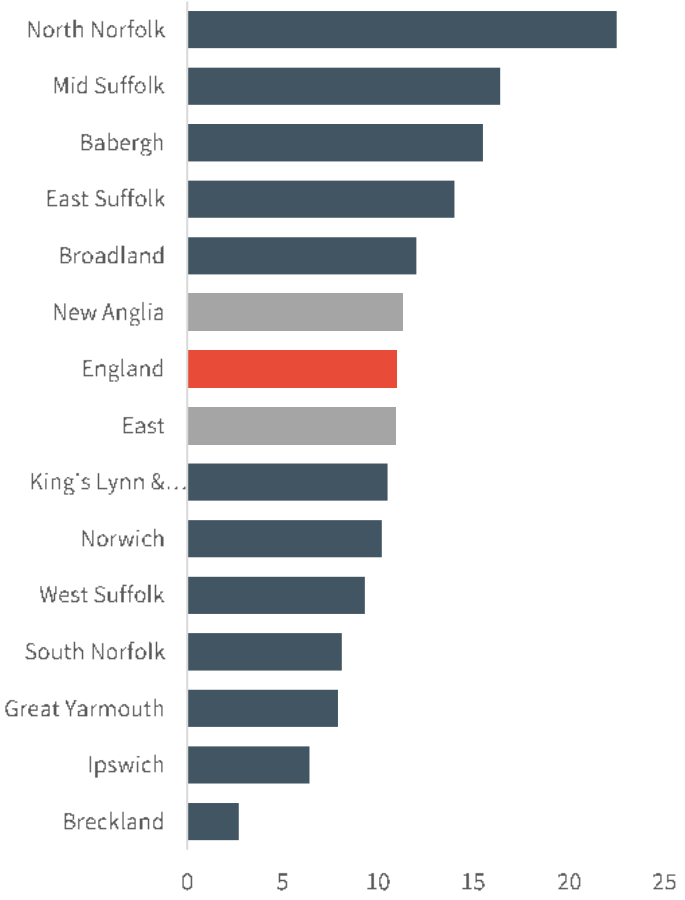
Data from the Family Resources Survey shows that between 2007 and 2018, full time employees were on average £4,000 per year better off than those who are self-employed. Lower earnings are likely to link directly to lower levels of financial resilience to be able to survive a prolonged economic downturn.

To combat this, many self-employed people have been able to claim Self-Employment Income Support Scheme (SEISS) to top-up lost income as a result of the pandemic. In New Anglia 62% of self-employed people have accessed SEISS, which is below the national average (67%). Despite this the average value of claims made is marginally greater than the national average (£2,600 and £2,500 respectively).

% of take up of SEISS



% of 16-64-year olds who are self employed, 2020



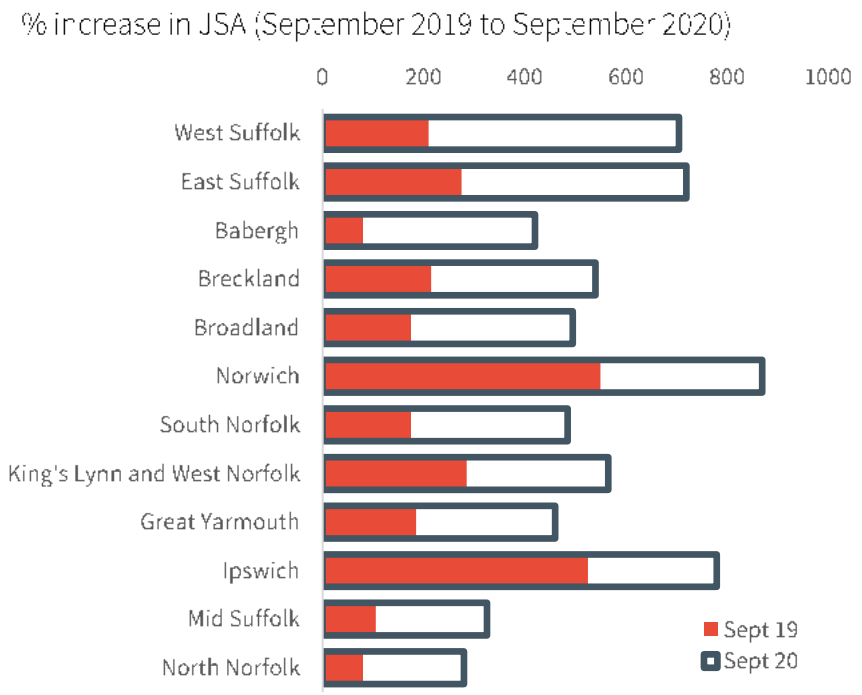
Source: Annual Population Survey, HMRC SEISS (October), ONS Family Resources Survey

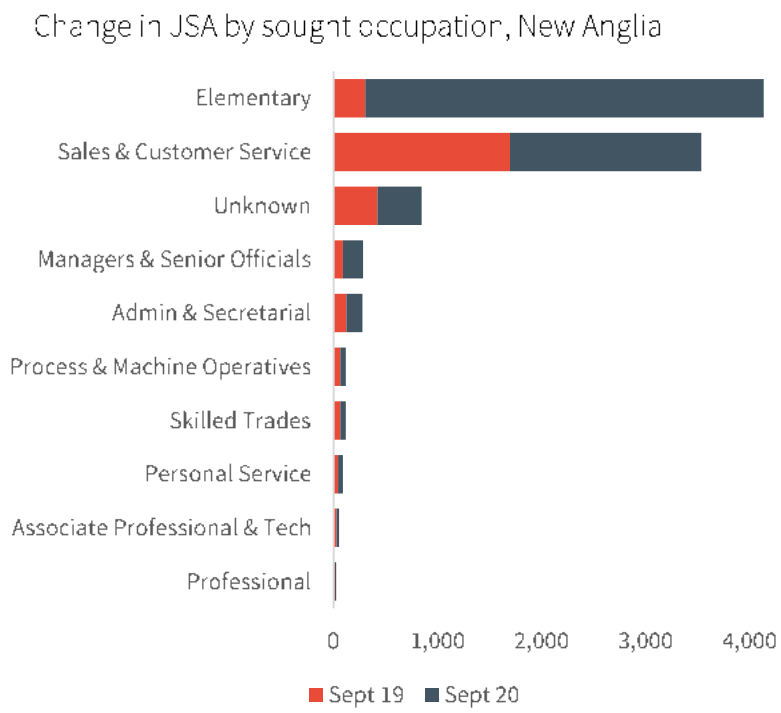
Job Seekers **Allowance**

Potential mis-alignment between advertised vacancies and occupational profile of job seekers…

Across the board, there has been a significant increase in JSA claimants across New Anglia LEP with an increase of 132% over the last year (September 2019 to September 2020). At the local level there have been a number of hard hit areas with Babergh experiencing the greatest increase in JSA, followed by North Norfolk and West Suffolk (425%, 250% and 236% respectively).

By JSA by 'sought occupation' provides insight into the types of roles required to find suitable employment. There has been a substantial increase in people seeking work in the lower skilled elementary occupations, increasing by 1,157% compared to the same month in 2019.





Source: ONS Claimant Count

Cultural Sector's Impact on **Inclusive Growth**

The Cultural Sector Plays an Important Role in Generating Social Value in Communities

There is a strong and growing evidence base helping to make the case for public sector investment, in particular the role it can play in generating social value that can support inclusive growth within economies.

This section highlights some of the emerging research into the value that can be generated from the culture sector, the important role it can play in supporting communities, and the impacts it has on health & wellbeing and skills development.

Health and Wellbeing

The All-Party Parliamentary Group on Arts, Health and Wellbeing Inquiry published a report in 2017 outlining the range of ways that arts and culture can generate benefits for health and wellbeing, as well as setting out recommendations for how this evidence could be used to better deliver public health and social care services using arts and culture led approaches.

The report cites examples from a collated evidence base, of ways that arts and culture activities can enhance health and wellbeing in local communities, including the following:

- Visual and performing arts in healthcare environments help to reduce sickness, anxiety and stress
- The heart-rate of new-born babies is calmed by the playing of lullabies. The use of live music in neonatal intensive care leads to considerably reduced hospital stays
- Through participatory arts programmes, after engaging with the arts, 79% of people in deprived communities ate more healthily, 77% engaged in more physical activity and 82% enjoyed greater wellbeing
- Participatory arts activities with children improve their cognitive, linguistic, social and emotional development and enhance school readiness.
- An arts on prescription programme has shown a 37% reduction in GP consultations and 27% reduction in hospital admissions, representing a saving of £216 per patient.
- Social return on investment of between £4 and £11 has been calculated for every £1 invested in arts on prescription.
- Music therapy has been shown to reduce agitation and need for medication in 67% of people with dementia

As a result, the arts sector is increasingly being seen as an integral partner in the development of local health and social care plans. With a proven ability to positively impact on issues including health inequality, mental health, long-term conditions, and ageing, the creative and cultural sector makes an invaluable contribution to a healthy and health-creating society

Cultural Sector's Social Impact

The Cultural Sector Plays an Important Role in Generating Social Value in Communities

Skills Development
Work commissioned by Arts Council England in 20191 showed that 66% of arts organisations surveyed engaged volunteers in delivering arts and cultural activities. The report highlights the potential benefits of this activity in creating substantial benefits for individuals. These include opportunities to develop new skills and experience both directly in arts and cultural activities and also more generally in areas such as communication, teamwork, leadership, organisational skills, improved confidence, strategic development and planning. Much of this is already articulated within New Anglia's Cultural Sector Skills Plan, providing an ambitious plan for maximizing skills opportunities across the area.

Widening Access and Participation
Unfortunately, the benefits of the arts are not enjoyed equally. People from poorer backgrounds continue to be less likely to engage with the arts, and the same is true for people of Black, Asian or Minority Ethnic heritage. If you are disabled, come from a lower socioeconomic group, don't own your own home, or don't have higher level qualifications, you are less likely to have participated in the arts.
The Taking Part Survey for 2019/20 showed that those living in the 10% most deprived geographic areas in England, 59% reported having engaged with the arts at least once in the past 12 months whilst this was 83% for those living in the 10% least deprived areas. Adults of White or Mixed ethnicity were more likely to have engaged with the arts (78-81%) than those of Black or Asian ethnicity (61-63%). This trend is similar to that observed in 2018/19. The survey also showed that across all regions in England, London had the lowest art engagement levels.

Investing in Art and Artists
Arts and culture contributes £10.6 billion to the UK economy, with culture bringing £850 million to the UK through tourism. The DCMS estimated 89,000 UK jobs in museums, galleries and libraries and 296,000 UK jobs in music, performing arts and visual arts in 2019.

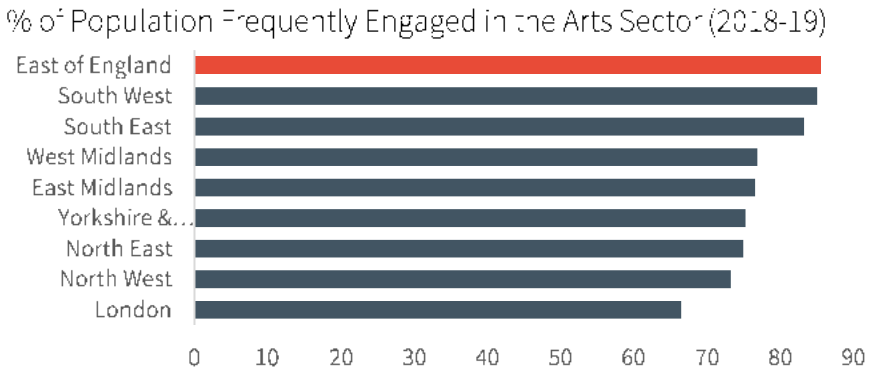
The UK was ranked second on the Soft Power Index in 2019, reflecting its strengths in culture, education and digital as well as business and Government. The UK arts scene and performing artists are world renowned - from stand-up comedy and theatre to opera and musicians - and tour internationally, either via commercial arrangements or by support from the British Council and others. The arts are viewed as a cornerstone of the British Council's mission to create a friendly knowledge, understanding and connection between people of the UK and the wider world.

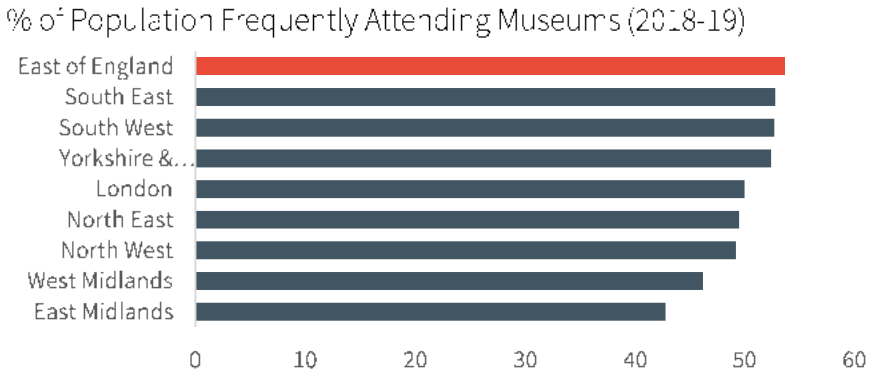
Participation in the Cultural Sector

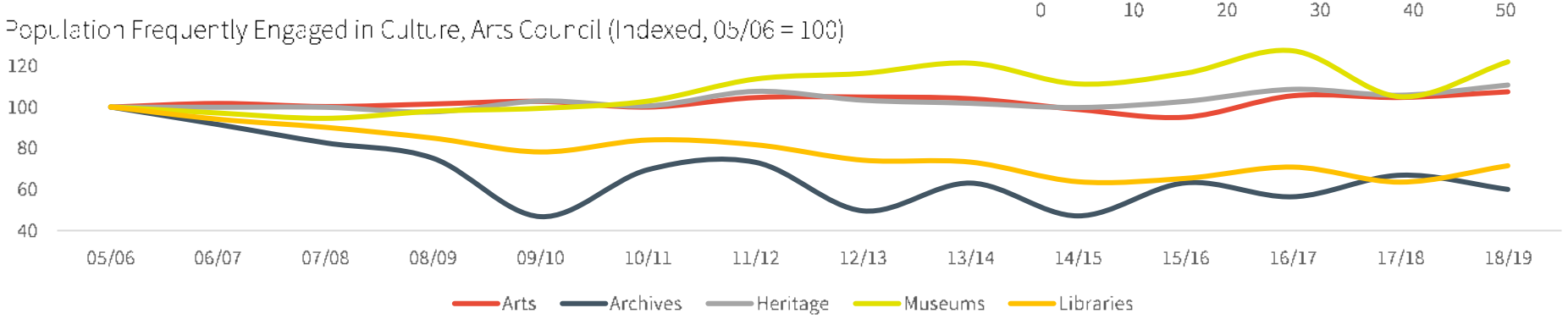
High levels of participation in the cultural sector in the East of England…

According to the DCMS Taking Part Survey (2018/19) there has been an increase in participation levels in sub sectors, arts (+7%), heritage (+11%) and museums (+22%) over the period 2005/06 to 2018/19. However, there has been a decrease in participation with libraries (-29%) and archives (-40%) over the same period in the East of England. The decrease in participation in libraries and archives across the East of England matches a reduction in the number of businesses within the sector in New Anglia LEP.

According to the DCMS Taking Part Survey (2018/19) 86% of adults in the East of England engaged with the arts at least once over the last 12 months. This is the highest level of participation out of all regions in England, with the national average level of participation at 78%. Additionally, the East of England has the highest participation in terms of museum visits (54%), higher than the national average (50%). According to the NSVC annually over 1 million people attend performances across their 19 venues in New Anglia LEP.







Source: DCMS Taking Part Survey 2018/19 *the 2019/20 survey was cancelled due to COVID 19

Skills Development in the Cultural Sector

Strong skills attainment across New Anglia, but potential to enhance cultural skills across the workforce in the future…

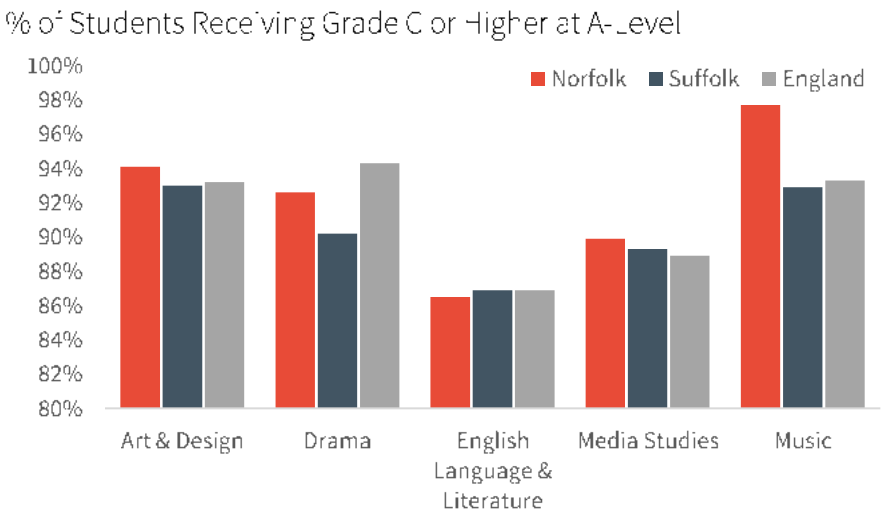
The New Anglia Cultural Sector Skills Plan sets out a collective vision for how skills development can support the growth of the sector, increasing local competitiveness, supporting inclusive growth and building high quality local careers. The vision for the area is to create a cultural economy that is dynamic, inclusive and creative in its leadership as well as its delivery. The skills ambitions is to drive place-based inclusive growth through the recruitment and development of a skilled, socially mobile and diverse, creative, local workforce by championing:

1. Well informed new entrants having opportunities to gain high quality work-based learning and pathways to progress their careers
2. An inclusive, dynamic cross-sector leadership and professional development network
3. Accessible, vibrant local cultural workplaces
4. 'Clustering' for the benefit of all New Anglia through the collocation, collaboration and combined skill-sets of the Norwich and Ipswich cultural and creative hubs

The 2019 Employer Skill Survey provides an insight to hard-to-fill vacancies and skills gaps, however does not provide data specific to the cultural sector in New Anglia LEP. Across the wider economy, it identifies that 1.2% of vacancies are hard-to-fill at present, of which half are due to skill shortages across the area.

Hard-to-fill vacancies are typically within higher-skilled roles, with 19% of such vacancies being amongst professional occupations and 29% amongst skilled trades. The most typical reason for a skills shortage is a need for specialist skills or knowledge, which accounts for 74% of all hard-to-fill vacancies.

Data on skills amongst those leaving schools shows that attainment levels for students in culture-related subjects at A-Level is strong. Norfolk slightly outperforms Suffolk across the five subjects analysed, with the area outperforming the national attainment rate for art & design, media studies and music.



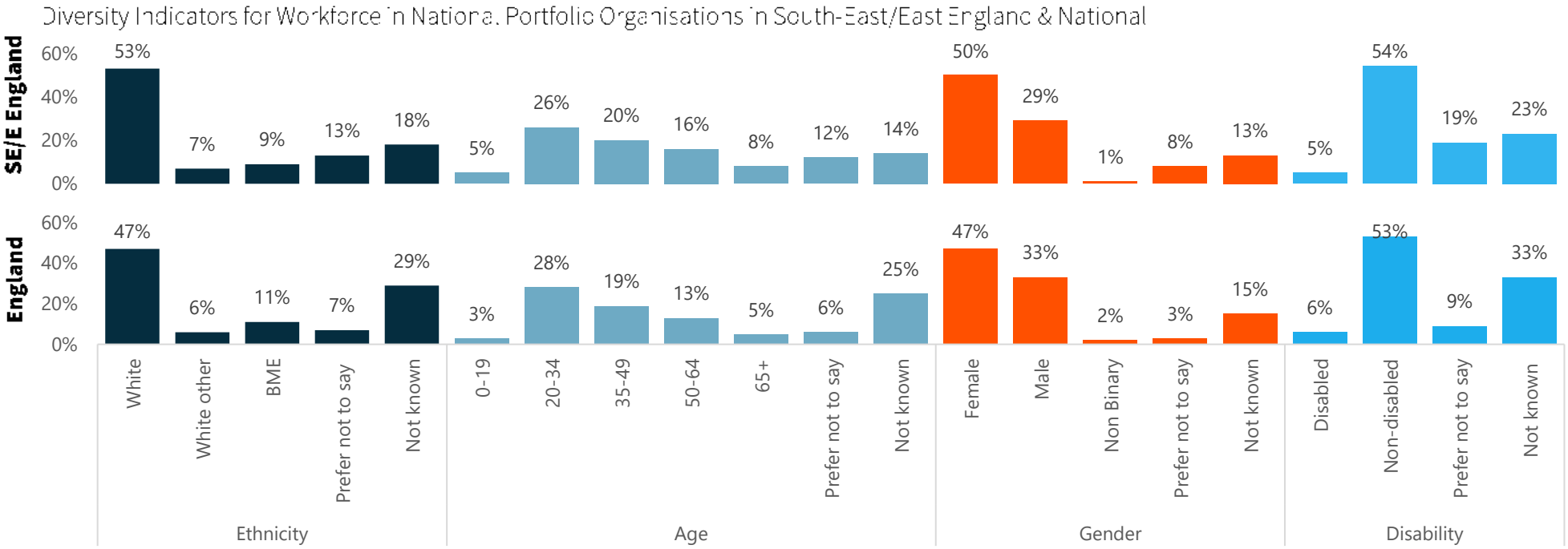
Source: xxxxx

Workforce Diversity in the Cultural Sector

The cultural sector has a diverse workforce, but this could be improved…

There is no single data source that specifically monitors the inclusiveness of the cultural sector's workforce. Survey data released by Arts Council England provides an overview of the diversity of the workforce within National Portfolio Organisations (of which there are 16 within New Anglia LEP). Although this does not provide a perfect reflection of the diversity of New Anglia's cultural workforce, it provides an indication as to the characteristics of people working within the sector.

This data shows that there is a diverse range of people employed by the National Portfolio Organisations in the South-East and East of England, but that this does not fully reflect the diversity of the general population. Relative to the rest of the population, there is an under-representation of males, those from BAME backgrounds and those identifying as having a disability.



Source: Art Council England, National Portfolio Organisations Annual Diversity Report, 2018/19

Deprivation

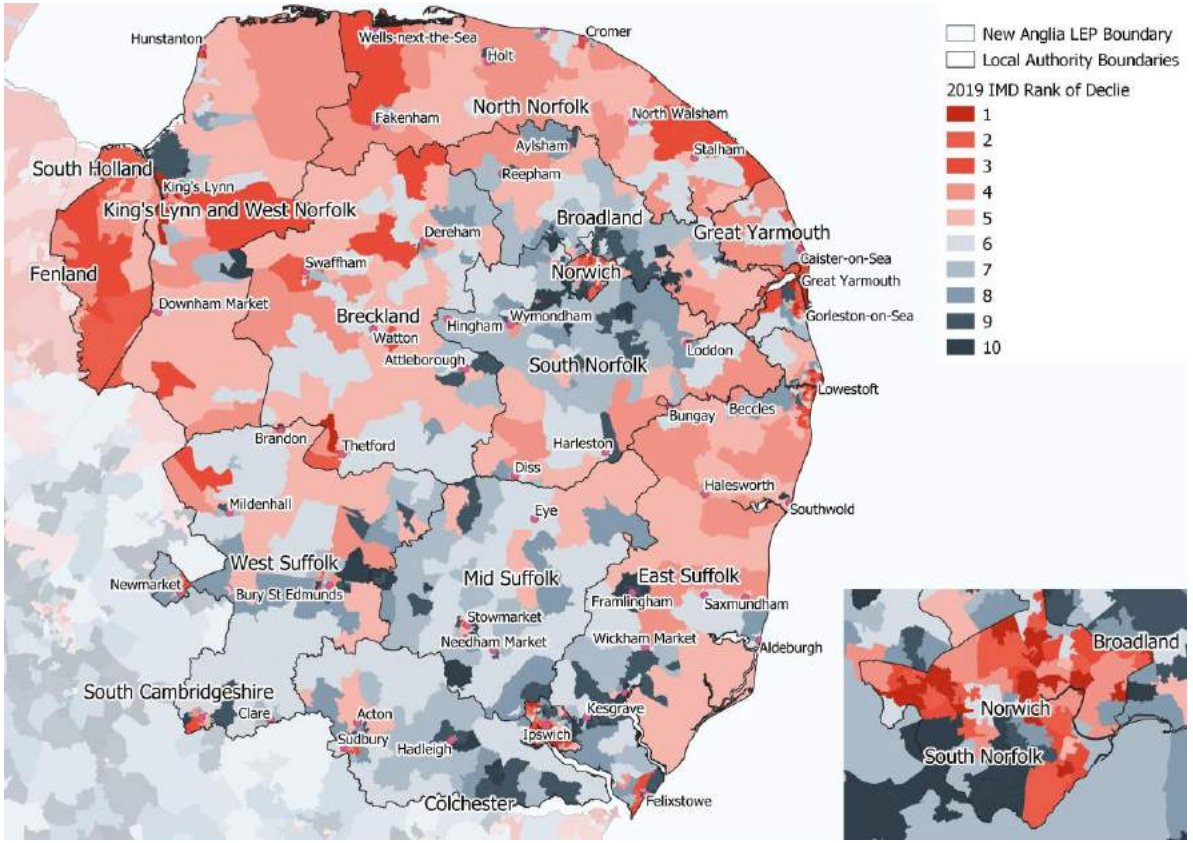
High levels of deprivation in some areas could significantly impact resident outcomes…

To deliver an inclusive recovery it will be important to dedicate and prioritise resources where there is greatest need/exposure to the effects of a recession.

New Anglia LEP is ranked 18th out of 38 local enterprise partnerships across England meaning it ranks in the middle in terms of overall deprivation. The LEP ranks worst in terms of education, skills and training where it is the 3rd most deprived LEP. At an authority level there is a great disparity in terms of deprivation with the most deprived being Great Yarmouth (24th most deprived), Norwich (61st most deprived) and King's Lynn and West Norfolk (79th most deprived).

Levels of deprivation are typically higher in parts of Norfolk, with concentrations around a number of coastal areas (including Great Yarmouth, Lowestoft, Wells-next-the-Sea and King's Lynn. The central urban areas of Norwich and Ipswich also contain relatively high levels of deprivation, with the surrounding hinterland typically being amongst the the least deprived areas of the LEP.

Deprivation in New Anglia LEP, 2019



Source: Indices of Multiple Deprivation

Health Deprivation

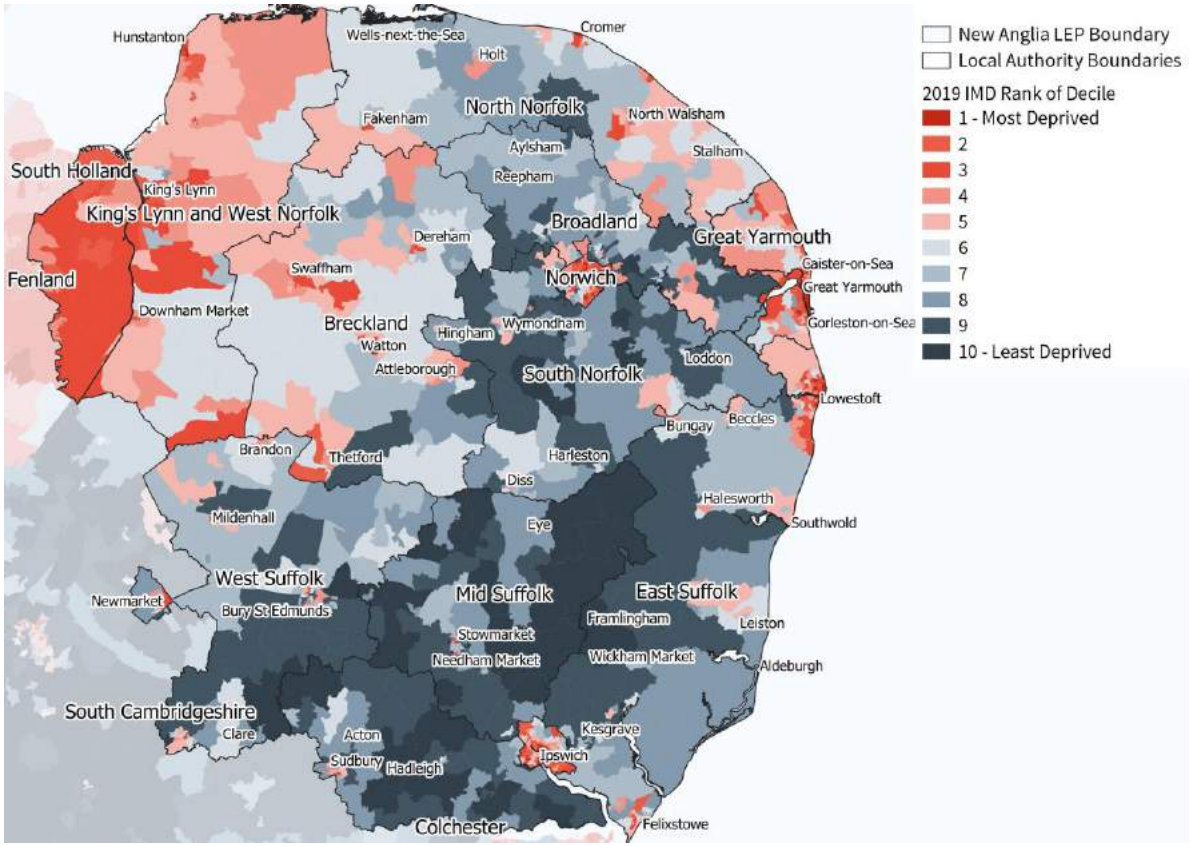
There are pockets of health deprivation across the New Anglia LEP…

Parts of the New Anglia LEP have lower health outcomes relative to the national picture. Areas with the highest health deprivation can be found in Fenland, King's Lynn & West Norfolk, Great Yarmouth, Norwich and Ipswich.

Suffolk has a higher life expectancy relative to Norfolk, with the average life expectancy in Suffolk being 80.7 years, compared to 79.9 years in Norfolk. In both Norfolk and Suffolk, life expectancy is slightly above the national average (79.6 years)

As mentioned previously, culture has a role to play in providing more positive health outcomes amongst local communities. Research has shown that by engaging with participatory arts programmes, 79% of people in deprived communities ate more healthily, 77% engaged in more physical activity and 82% enjoyed greater wellbeing

Health Deprivation in New Anglia LEP, 2019



Contains OS data © Crown copyright and database right 2019

Source: Indices of Multiple Deprivation

Social Groups

New Anglia has a diverse range of social groups, with a need for cultural engagement across all groups…

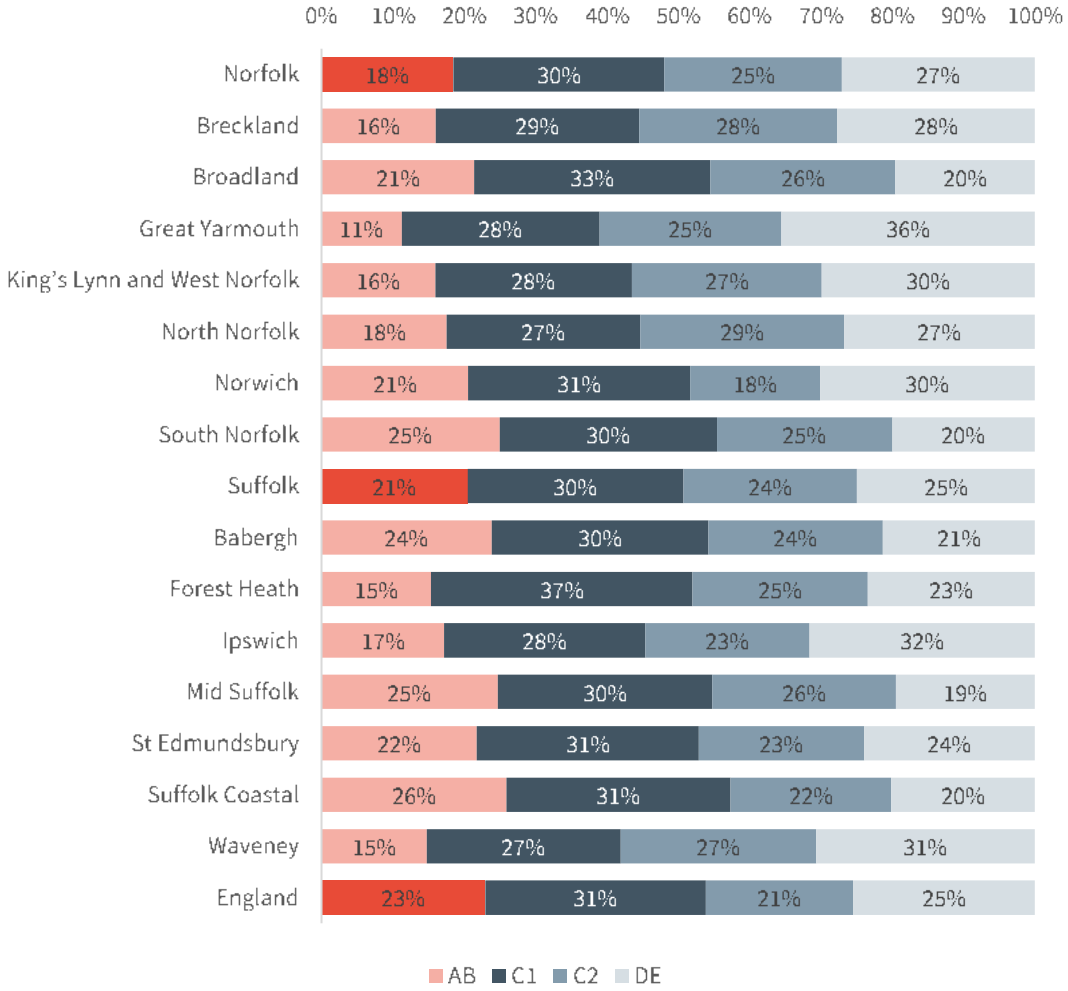
In a similar manner to the varying levels of deprivation identified across New Anglia, there also exists a range of social groups across the area.

To identify social groups, the National Readership Survey social grades classify the population based on the occupation of the head of the household. The classifications that are defined by ONS are:

- AB – upper middle/middle middle class
- C1 – lower middle class
- C2 – skilled middle class
- DE – working class / non-working

There is a range of characteristics across New Anglia when compared to the national picture, but at a high-level, social grades tend to be slightly lower in Norfolk compared to Suffolk and the national picture, reflecting the general trend within the deprivation indices. 18% of households in Norfolk identify within social group AB compared to 21% in Suffolk and 23% across England. By comparison, a higher proportion of households are in social group C2DE, accounting for 52% of households in Norfolk compared to 49% in Suffolk and 46% nationally.

Social Grade New Anglia LEP, 2011



Source: Census, ONS, 2011

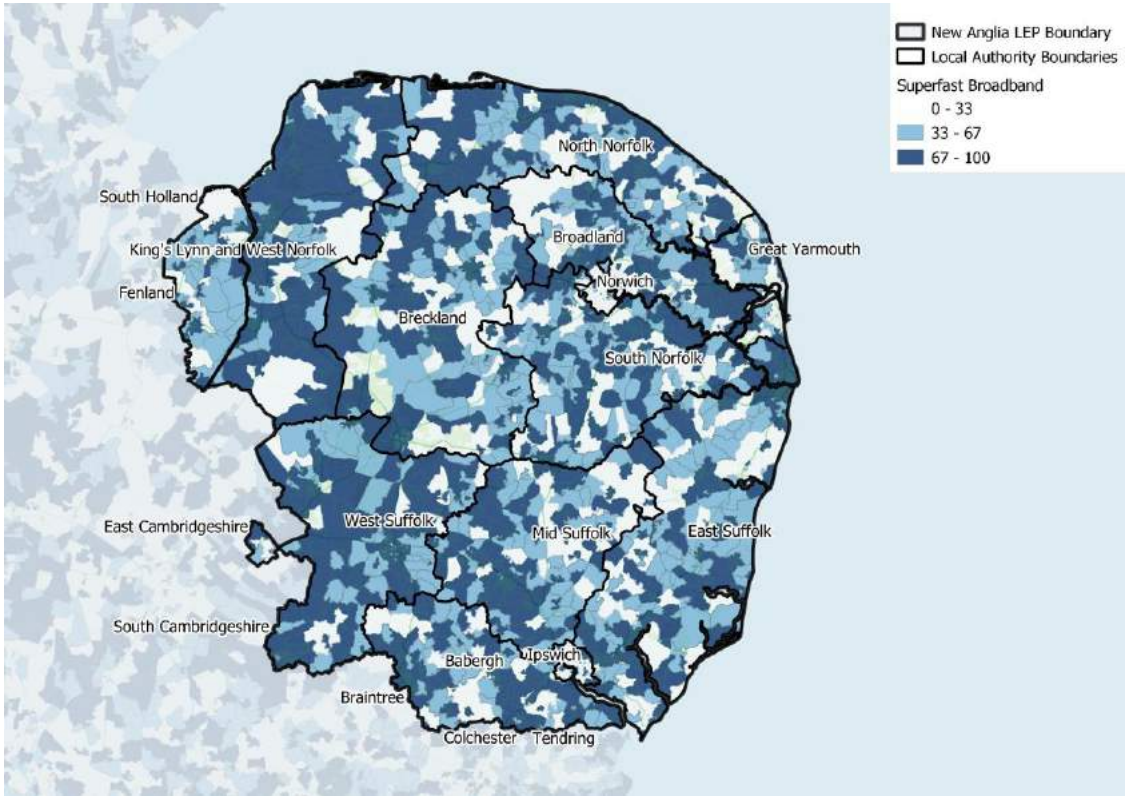
New Anglia's **Connectivity**

Mixed access to Superfast Broadband may affect homeworking ability and heightens risks of digital exclusion…

In addition to the industrial needs of some firms, access to Full Fibre and broadband speeds above Superfast to residences will be increasingly important with working patterns shifting increasingly towards remote working, and cultural content and resources being increasingly accessed through the internet.

New Anglia currently has a mixed broadband picture, with many areas already having good access to Superfast Broadband. Currently 95% of homes in Norfolk and 97% have access to superfast broadband (recorded as >24Mbps), but only 34% of properties in Norfolk and 36% of properties in Suffolk have access to ultrafast broadband (>100Mbps). As more businesses and workers use the internet, enhancing the role-out of the highest speeds of broadband will support the development of the sector, particularly connecting those in rural areas.

% of properties with access to Superfast Broadband (>30Mbps)



Source: Ofcom

Evaluation Framework

Evaluation Framework

Monitoring the progress of the cultural sector

To support Culture Board's ongoing work to demonstrate the culture sector's economic value, the current impact of the COVID-19 recession and the role of the cultural sector in recovery, an evaluation framework has been developed to enable ongoing analysis of the role of culture in growth and economic recovery from the COVID-19 recession. There are a number of important considerations in developing a framework which can be used to monitor the progress of the sector in the future:

- The framework should include all relevant indicators, but also deliver a clear and concise package of data which can be easily accessed and analysed (and also be updated going forward).
- These data sources should be well-recognised by all stakeholders and provide a sound basis from which strategic thinking and investment application can be made.
- The data should monitor and inform the ongoing delivery of the Cultural Strategy process going forward.

The indicators that have been chosen best represent those which can provide the evidence needed for key decision makers and external funders to understand the impact, role and value of culture as a driver for inclusive growth and economic recovery from the COVID-19 recession, both in absolute terms but also for the value that it adds to the identity of the region and inward investment.

This framework should be reviewed on an ongoing basis, particularly given the ever-changing economic and data landscape created by COVID-19, with new data sources being released on an ongoing basis.

The evaluation framework follows a similar structure to the one set out in this report to allow for easy updates and comparison with the data already collected as part of this data pack.

For each indicator that has been identified, further information has been provided on the source for each, the geography covered and the frequency of the updates (to inform future work).

Evaluation Framework

A framework for monitoring the sector's performance…

Foundation	Indicator	Source	Geographical Scale	Frequency of Update
Economic Output of Culture	GVA performance within the cultural sector	• ONS Regional Accounts	LEP	Annual
	Economic Output of Local Cultural Businesses	• Survey of culture businesses	LEP, Local Authority	Ad-hoc
Business Environment within Cultural Sector	• Number of Cultural Businesses • Size of Cultural Businesses • Business growth over the last 5yrs • Geographical distribution of Cultural Businesses • Age of Cultural Businesses • Turnover of Cultural Businesses	• Companies House • UK Business Count	LEP, Local Authority	Annual
	Public sector investment into the cultural sector	• Successful funding applications through Arts Council • Cultural Recovery Fund awards	LEP, Local Authority, Towns	Ongoing
	Inward Investment Enquiries	• LEP	LEP	Ongoing

Evaluation Framework

A framework for monitoring the sector's performance…

Foundation	Indicator	Source	Geographical Scale	Frequency of Update
Cultural Workforce	• Number of jobs in cultural sector • Employment Growth over the last 5yrs • Geographical distribution of cultural employment	Employment data - BRES	LEP, Local Authority	Annual
	Skills within the local workforce	Annual Population Survey	LA	Annual
	Courses undertaken & attainment achieved by school leavers	Ofqual	LEP	Annual
	Diversity of the workforce in the cultural sector (e.g. gender, ethnicity, social group, sexual orientation)	Primary Research	LEP	As required
Cultural Inclusive Growth Indicators	Cultural and sport participation	The Taking Part Survey, Arts Council	Regional	Annual
	Participation in the arts	DCMS (Diversity indicators)	National	Annual
Wider Societal Performance	Deprivation (e.g. health & wellbeing sub-indices)	Index of Multiple Deprivation	LA (down to LSOA)	Every 3-4 years
	Broadband connectivity	Ofcom	LA (down to LSOA)	Annual
	Unemployment levels (by occupation sought)	Claimant Count, ONS	LA	Monthly

Conclusions & Implications
for Cultural Strategy Development

Conclusions

New Anglia's cultural sector plays a significant role within the area's economy, creating £272m GVA per annum, supporting nearly 7,000 jobs and accounting for around 1,250 businesses. The area has a growing cultural sector, with 24% employment growth over the last five years, and significant strengths in arts, writing & music. Given the sector's activities, it plays a strong role in supporting other sectors of the economy, including the tourism, creative industries and digital sectors.

The data shown in this report highlights a range of well-established cultural locations (including New Anglia's largest urban areas) alongside a range of rapidly emerging areas, in which cultural activity is starting to become more prominent. The sector is dominated by smaller businesses (with 81% employing less than 4 people), and also employs a diverse range of people, with the cultural workforce dominated by those under 24 and 50+ years old.

Despite many of the strengths identified within New Anglia's cultural sector, it is clear that are a number of pre-existing challenges facing the sector, alongside new challenges that have been presented by COVID-19. Pre-existing challenges facing New Anglia (e.g. skills deprivation) have been exemplified by COVID-19, particularly the cultural sector, which has been one of the most impacted by COVID-19. The sector has never fully recovered momentum after 2008-09 recession, with GVA growth lagging behind the rest of the economy and the sector taking nearly 10 years to fully recover. This presents a challenge in recovering from COVID-19, particularly given its hard-hitting impact.

The structure of New Anglia's economy, with a higher proportion of smaller businesses who are typically more vulnerable to the impacts of COVID, further puts the sector at greater risk, with emerging evidence showing that the impacts of COVID-19 is most focused amongst rural communities and amongst lower-skilled roles. Supporting those communities and jobs will be critical over the short-term in order to help rebuild the cultural economy across the area.

Factors to Consider in Developing Cultural Strategy

How New Anglia responds to the challenges presented by COVID-19 and pre-existing challenges will be critical in determining how agile the sector will be in recovering from COVID-19.

There are a number of ways in which New Anglia can respond to the crisis and place the cultural sector in a strong position for the future:

- **Emphasising culture's role in supporting wider economic recovery**: culture plays an important role in supporting growth across the rest of the economy, with strong crossovers into other sectors. A strong culture sector will be vital in supporting the recovery of other sectors of the economy (e.g. tourism and the creative industries).
- **Using culture to build social cohesion**: culture positively impacts on community resilience by building social cohesion. Research shows that communities with strong social cohesion often bounce back faster in the recovery process, being well organized and having a shared sense of unity.
- **Support small businesses in recovering**: New Anglia's cultural sector is dominated by small businesses, and in particular freelancers, who are among the most vulnerable to the effects of COVID-19. It is critical that these businesses are supported through the remainder of the crisis, and once the crisis is over.
- **Support the cultural workforce**: work with the cultural skills market to support people at risk of losing their jobs to find opportunities in other markets, both in the local cultural economy, but also within cultural/creative roles outside of the sector. This builds on much of the evidence and action from the LEP's Cultural Sector Skills Plan.
- **Promotion of the sector in a post-COVID-19 world**: there is expected to be a strong economic rebound following the end of restrictions, with pent up demand fueling a mini-economic boom. New Anglia should ensure it positions itself well to take advantage of this demand when it comes, supporting cultural businesses of all sizes.

For more information,
please visit www.hatch.com

HATCH