ACKNOWLEDGEMENTS

The task of writing this report would have been very difficult without the assistance provided by the more than seventy respondents, identified at *Appendix 2*, who provided documentation, advice and guidance on what is, in effect, a rich seam of cultural sector research in the South West. My thanks and gratitude are due to them, as to the members of the Steering Group for this project, identified below, who provided strategic guidance for the completion of the project.

Colin Mercer, September 2003

THE STEERING GROUP

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Clare Frank, Arts Council England, South West
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EXECUTIVE SUMMARY AND RECOMMENDATIONS

KEY FINDINGS

1. Cultural sector research in the South West is widespread and active. It is also fragmented and uncoordinated and in need of a combination of regional leadership, a focussed regional agenda and incentives to both *extend* its application and relevance for policy, and *to deepen and enrich* its conceptual and methodological base. This is especially important in the context of both the demonstrated cultural sector growth figures for the sector in business count, employment and turnover, and its equally demonstrable contribution to quality of life and regional image and attractiveness.

2. Cultural sector research in the South West, both quantitative and qualitative, is unevenly distributed in significant measure across the seven domains or sub-sectors which make up the cultural sector (Visual Arts, Performance, Audio-Visual, Books and Press, Heritage, Sport, and Tourism). Those domains or sub-sectors which are more aligned to mainstream industry profiles (Audio Visual, Books and Press, Sport, and Tourism) are best served by available quantitative (but not qualitative] data. Those domains or sub-sectors in which public funding is of strategic importance (Visual Arts, Performance, Heritage) are, with notable exceptions such as the Libraries, Museums and Archives (LMA) sector, significantly less well served by available data sources.

3. The cultural sector suffers, overall, from poor definition and delineation and a low policy profile. While it is a widely-used term – from colour supplements to university courses – what counts as culture has always been problematic. This is partly an effect of historically embedded hierarchies which have sharply differentiated high art forms from more popular forms of culture. It is also partly an effect of a long-standing perception that culture is in some sense intrinsically resistant to the more instrumental concerns of statistical measurement and policy calculation. These conceptual and qualitative problems of definition have a knock-on effect in quantitative terms (how many people enjoy, participate, etc and *why*). Historically this has meant that culture, unlike, for example its close relative, the environment, has been a relatively policy-free zone. This hinders understanding, analysis and policy development for the sector and an appraisal of its actual and potential contribution to sustainable regional economic development and quality of life. In this report the view is taken that culture is much too strategically important – for quality of life, for business growth, for employment and social inclusion - to be left to guess work when it comes to policy.

4. Lack of sufficiently sensitive and differentiated quantitative data on business count, employment and turnover in the cultural sector seriously hinders the development of regionally specific intelligence and a knowledge base for the sector. The application

of the *Regional Cultural Data Framework* (RCDF)[1] and the planned revision of Standard Industrial Classification (SIC) codes in 2007 will address this issue in the short to medium term but there is a strong need for a regionally specific intelligence and knowledge base for the cultural sector.

5. The high level of 'statistically invisible' workers in the cultural sector (part-timers, many freelancers, non-VAT returning businesses) means that even statistical counts based on current National Statistics data sets significantly underestimate the size, impact and value of the sector to the regional economy

6. There is a lack of clear sector definition and a resultant lack of clarity on contributions to, and impacts on, regional development and quality of life. This is compounded by confusion about the definition of, and relationship between, the domains or sub-sectors which make up the cultural sector and their potential strategic relationship on a joined-up policy agenda which simultaneously addresses economic development and quality of life.

7. While not specific to the South West region, the lack of robust qualitative research on the cultural sector (especially that which can be represented in quantifiable forms) is a serious hindrance to the development of an evidence-based resource and knowledge base for policy development and planning.

8. With notable exceptions, the most research-competent institutions in the South West – its universities – have neither the incentives nor the agenda or guidance, within current funding and policy settings, to engage robustly and rigorously with regional cultural sector research needs and issues.

9. The conditions for an effective and ongoing knowledge and intelligence base exist now, at various levels, in ways that have never existed before, and it would be appropriate and timely to capitalise on these conditions which include:

- Local authority work on cultural strategies, community strategies , Best Value and Comprehensive Performance Assessment

- The regional context of a new *Regional Economic Strategy*, an impending revision of the *Regional Cultural Strategy*, the development of an *Integrated Regional Strategy* and the developing agenda for research of the South West Observatory and the South West Intelligence Database.

- The national context of an active Creative Industries agenda, the development of the *Regional Cultural Data Framework* and renewed attention to culture in mainstream policy agendas from economic development to social inclusion.

[1] Department for Culture Media and Sport and the English Regional Cultural Consortia (2002) *Regional Cultural Data Framework: A User's Guide for Researchers & Policymakers* and Final Technical Report cam be downloaded from the Culture South West website at www.culturesouthwest.org.uk

- The international and global recognition of the strategic importance of the cultural industries to sustainable growth in the context of the knowledge economy.

10. From local through sub-regional to regional levels, there is sufficient evidence in the documentation and research audited for this report that the cultural sector is the South West is vibrant, diverse, and growing rapidly. The sector also has many productive connections with strategic regional agendas in economic development, employment growth, joining the information and knowledge economies, enhancing regional image and profile, addressing social exclusion and improving quality of life. To engage and develop this momentum there is a strong need to consolidate and build on the baselines for quantitative and qualitative cultural sector research in ways that are addressed in the recommendations that follow.

RECOMMENDATIONS

Key Recommendation 1: enhancing the quantitative baseline

The *quantitative* baseline for cultural statistics and data for the South West cultural sector should be significantly enhanced by:

- Baseline statistical mapping of Standard Industrial Classification (SIC) and Standard Occupational Classification (SOC) codes and other sources as suggested by this report and building on the recommendations and directions of the *Regional Cultural Data Framework* (RCDF).

- Establishment of a research coordination and clearing house function overseen and managed by Culture South West linked with the South West Observatory.

- Collation of existing data from sub-regional and local levels.

- Encouragement of local area, and sub-regional cultural sector[2] mapping.

- Addressing the 'gaps' identified by this report in regional research outputs in the areas of marketing, promotion, dissemination and distribution.

[2] In this report the term 'cultural sector' includes both publicly-funded and community-based cultural activities and institutions and the commercial or 'creative industries'.

Key Recommendation 2: enhancing the qualitative baseline

The *qualitative* baseline for research in the South West cultural sector should be greatly enhanced by

- Support for region-wide and sub-sector specific mapping relating to attitudinal factors in the cultural sector.

- Collaboration with universities and other regional and national research-competent institutions on the relationship between cultural, social, human and economic capital at regional level.

- Encouraging and facilitating research on the relationship between culture, identity, image and sense of place.

Key Recommendation 3: sub-sectoral priorities

This report has identified sub-sectors where the paucity of both quantitative and qualitative data is a serious hindrance to policy formation, planning, and development. This situation should be addressed by supporting and facilitating:

- Region-wide research into the Visual Arts and Performance sub-sectors as identified in the RCDF. For the Visual Arts sub-sector, in particular, there is an urgent need to investigate the distribution and retail end of the sector’s activities in the form of galleries, dealers and the wider arts and antiques market. Within the Performance sub-sector there is also an urgent need to investigate the extent and nature of the music industry, both performed and recorded, in the region.

- Region-wide research into the size, extent and impact of the crafts, design, and creative new media (including games and interactive leisure software).

- A region-wide study of the extent and economic impact of the historic environment sector building on work already completed or underway in the region including Stonehenge, the *Cornish Mining World Heritage Site* bid and public realm infrastructure ('public product') in Cornwall

- A region-wide impact study for the tourism sub-sector focussed especially on the relationship between tourism and the region’s cultural assets.

- A region-wide research agenda, with South West Tourism, English Heritage, South West Museums Libraries and Archives Council (SWMLAC) and other agencies, on the conditions for a sustainable cultural tourism initiative.

- A region-wide research initiative with Sport England (South West) on the social benefits of sports participation to complement the work already undertaken on the economic impact of sport.

Key Recommendation 4: cultural data and quality of life indicators

This report has identified the need to enable and facilitate translation from data to information to knowledge and policy in the context of both ‘joined-up government’ and addressing urgent cross-cutting policy issues such as cultural diversity, social exclusion, and regeneration. In this context Culture South West, in partnership with other regional and sub-regional agencies should:

- Initiate and oversee, with appropriate partner agencies, research into appropriate cultural indicators which links them to Quality of Life Counts, Best Value Performance Indicators and the Comprehensive Performance Assessment (CPA) process. A sub-regional model for this exists in the form of Bristol City Council’s Quality of Life Index.

Key Recommendation 5: incentives and mechanisms for applied cultural sector research.

This report has identified significant research capacity in the region that is in need of co-ordination and leadership. In partnership with the Higher Education Regional Development Association South West (HERDA-SW), South West of England Regional Development Agency (SWRDA), and regional universities, Culture South West should:

- Facilitate and/or establish a regional cultural research initiative with Higher Education representation to address the field of grant funded research supported by the Economic and Social Research Council (ESRC), the Arts and Humanities Research Board (AHRB), The Higher Education Funding Council for England (HEFCE) and other relevant funding sources.

- Enter discussions with HERDA-SW on the possibility of bidding to host the proposed Department for Culture, Media and Sport (DCMS) Research Centre.

- Ensure active and research-competent liaison between CSW and the HERDA-SW Creative Industries Group and individual universities, departments and research centres with track records and potential in cultural sector research.

THE PURPOSE AND CONTEXT FOR THIS STUDY

The purpose of and context for this study are partly provided by one of its key findings: that the cultural sector in the South West of England is dynamic, diverse and growing rapidly. In the number of businesses, the people employed, the turnover and the general contribution to the regional economy, the cultural sector – including both publicly funded cultural activities and institutions and the commercial creative industries – is a key 'knowledge industry' based on creativity, talent and intellectual property. These are strategic and renewable resources which make the cultural sector an important one in its own right. But there are also important connections and synergies with other key industry sectors including the quality and sustainability of tourism and the distinctive 'tourist product' of the region. Other high profile industries with which the cultural sector has a contiguous and positive synergistic relationship include Information and Communications Technologies (ICT's) and Education.

Yet we know relatively little about the cultural sector, either in the above terms, as an 'industry' or, in more qualitative terms, as a contributor to quality of life, community cohesion and general well-being. It is only since 1997 with the establishment of the Creative Industries Task Force that this sector has begun to be taken seriously in industry terms and it has taken a little longer to recognise, in the context of regionalisation, that culture is a very important component of *regional* strategic and competitive advantage. It is at the regional level that culture both draws on and provides the creative resources for its distinctive products and experiences. In the visual arts, performance, the audio-visual sector, in music and literature, in the immense range of its heritage assets, in sporting talent and prowess, and in its tourism capacity, the South West region has many unrivalled resources to compete with other English and UK regions and internationally.

But we need a 'knowledge base' to tell us and remind us of these facts and to guide policy, practice and sustainable development. In its Regional Cultural Strategy – *In Search of Chunky Dunsters* – Culture South West, the Regional Cultural Consortium stated a clear intention to build this knowledge base through a strong commitment to cultural sector research. It was recognised in that strategy that this research would need to be both quantitative and qualitative.

On the quantitative front, the publication by the Department for Culture, Media and Sport (DCMS) and the English Regional Cultural Consortia of the *Regional Cultural Data Framework* (RCDF) in late 2002 provided an important guide (and impetus) to the collection of regionally specific quantitative data on number of businesses, employment, turnover and participation in the cultural sector. That document has been important for this report and provides the basic template and framework for its analysis and recommendations. The RCDF also provides, for the first time, a unified definition for the cultural sector and its constituent parts which all regions can work with and agree on something approaching a 'common currency' for its assessment. With many of the relevant bodies involved in this process – Arts Council England, South West, English Heritage (South West), South West Tourism, Sport England (South West), South West Screen and the South West Museums, Libraries and Archives Council, it became possible to both agree a definition of the cultural sector, to reach agreement on what we needed to know about it and to move towards a strategy for 'knowledge management' for the cultural sector.

There was general awareness that, in the past five years especially, a good deal of cultural sector research had been undertaken at regional and sub-regional level in the South West. There was also awareness that there were lots of 'dots' of research being undertaken in the region but there was not, as yet, an overall picture of how these dots might join up to form an overall picture. Nor was there any overall picture of where the gaps might be – where more work, both quantitative and qualitative, needed to be done to inform policy settings and to guide assistance and intervention where appropriate.

This report is an attempt to remedy that situation and to point to future directions for cultural sector research which will enable the sector to grow and, most importantly, to grow sustainably. The report provides a picture of a rich and diverse pattern of policy-relevant and policy-enabling cultural research in the region but one where there are significant gaps and absences to be addressed in more co-ordinated and 'joined up' ways in order to position culture – and the cultural sector – where it now belongs: in the mainstream of public policy.

A Note on Methodology

This is the first exercise of its type in the South West Region and, to our knowledge, in the country and, as such, there was no predetermined methodology apart from that set out in the Brief for the project which is appended.. The following, however, were the key components.

Information Gathering and Consultation

Information gathering and requests for documentation was done via face-to-face contact, 'phone and email and through a search of relevant identified databases. This was done through

- the members of the Steering Group for the project, representing all of the regional cultural agencies in the South West;
- to relevant officers of the South West of England Regional Development Agency;
- identified key stakeholder groups such as Local Government Chief Leisure Officers and Arts Officers;
- Higher Education Regional Development Association – South West, via its Creative Industries group;
- All Vice Chancellors and Principals/Directors of Higher and Further Education Institutions in the South West and to some staff known to be working in the field;

- To all consultancy firms and individuals known to have worked or be working in the region;

- To the national Forum on the Creative Industries (FOCI) network of private and public sector researchers and specialists;

- To the relevant modules (Skills and Learning, Business and Economy) of the South West Observatory including the Core Unit; and,

- To further contacts and networks suggested by the above.

All respondents are identified in Appendix 2.

Analysis

Once in receipt of documentation and other information it was possible to sort the material into the seven ‘domains’ or sub-sectors set out in the *Regional Cultural Date Framework* (RCDF) and into other relevant categories, and to assess both the quantity and relevance of the documentation according to the RCDF Matrix (see p.3) and other criteria.

In addition to this audit and analysis of the documentation we were able to set out a provisional ‘quantitative baseline’ for the region’s cultural sector by commissioning the National Statistics Interdepartmental Business Register (IDBR) staff to provide the data sets for the Standard Industrial Classification (SIC) codes identified in the RCDF for the years 1998 and 2002 in order to assess five-year growth trends for the sector as a whole and for the seven domain or sub-sectors. This forms the basis for the charts and analysis set out in Section 2.0 of the report.

The analysis in section is also supplemented by other national information sources with regionally specific data, both public and confidential in order to get a least a headline picture of attitudinal, participation and expenditure patterns relevant to the cultural sector. These are identified in Section 2.0 and in Appendix 1.

The ‘culture cycle’ or value production chain model set out in the RCDF is also the analytical basis for the evaluation of strengths and weaknesses in cultural sector research adopted in this report. This has been modified from a six-stage to a five-stage model for the reasons set out in Section 4.0 of the report – partly informed by international best practice in this field - and a template matrix for future research, based on that modification is also proposed at the end of Section 4.0.

This model, in combination with consultation and advice from stakeholders, then forms the basis for the recommendations set out in Section 5.0.

All documentation is recorded in Appendix 1.

1.0 OVERVIEW

1.1 STRENGTHS AND WEAKNESSES IN REGIONAL CULTURAL SECTOR RESEARCH

1.1.1 Overview and framework for analysis

Cultural sector research in the South West is both widespread and active. From Gloucestershire in the North of the region to Wiltshire in the East through Dorset in the South and across to Cornwall and the Isles of Scilly in the West (and, for museums, libraries and archives, the Channel Islands,) there is barely a local authority or sub-region (defined as single or grouped local authority areas) that has not undertaken some form of cultural research in the period 1997-2003 covered by the brief for this project.

We have received – or consulted – around 170 separate documents or web sites (identified at *Appendix 1*) which are either centrally research-focussed or, as in the case of local cultural strategies for example, have significant *embedded* research which can inform the cultural 'knowledge-base' for the region. It is a rich picture, covering, albeit unevenly, all of the seven domains or sub-sectors identified in the Draft *Regional Cultural Data Framework* released in late 2002. These seven domains (also referred to in this report and elsewhere as sub-sectors) are:

1. Visual Art
2. Performance
3. Audio-Visual
4. Books and Press
5. Heritage
6. Tourism
7. Sport.

In addition, there are a number of research reports and other research-related documents covering both cross-cutting policy issues – social inclusion, cultural diversity, regeneration – and specific stakeholder interests such as Lottery and partnership/sponsorship work.

The field is rich and active with lots of 'dots' but, as yet, no clearly defined image, theme or coherent form to join and shape them. Like a *pointilliste* painting or the pixels on a computer screen, the dots only make sense when they add up – *or are added up* - to an overall image, picture or theme.

The richness of the field is complemented by the unusually wide range of agencies involved in research in, on and for the South West cultural sector. These include:

- local cultural organisations, agencies and institutions

- local authorities (especially with the incentive of undertaking Cultural – and now Community - Strategies, Best Value Reviews and Comprehensive Performance Assessment)
- private sector research and consultancy companies
- regional agencies with both sub-sectoral and general jurisdictions. Academic research on regional culture (and cultures), it is fair to say, is not quite yet strong but, at least, *strongly emergent* in a trend to be encouraged. There is also a good deal of national research with regionally specific data and comparators that can inform the bigger picture and help us to 'join the dots'. But to begin to complete the picture there is a good deal of regional work to be done *from the ground up and in a co-ordinated way*. *This will mean identifying research-competent people, agencies and functions responsible for that work of co-ordination.*

Fortunately there is now a tool – or at least a toolbox – to hand to assist in this process: the *Regional Cultural Data Framework* (RCDF) published in draft form by the DCMS and the English Regional Cultural Consortia in late 2002 (and available on the Culture South West website at www.culturesouthwest.org.uk). The RCDF, incomplete and subject to refinement as it is, has the merit of providing a clear definition of the 'cultural sector' and identifying the seven domains or sub-sectors listed above. Possibly more important, however, is the fact that it relates these seven domains to a value production chain or 'culture cycle' which enables us to 'scan' the cultural resource base from the moments of creation and production, through marketing and distribution to the point of consumption. In the case of the Visual Arts, for example, we are currently only able to count, through use of the Standard Industrial Classification (SIC) codes, an estimate of those people identifying *primarily* as a visual artist. We are not able to count, for example, suppliers of artists' materials, people employed in galleries, dealers auction houses, etc. This means that we can only have a very partial picture of the nature and extent of visual arts activity - the visual arts industry - in total in the South West. We know from both sub-regional studies and from everyday observation that the sector is much bigger than is currently represented in the statistical data. Using the 'culture cycle' or value production chain advocated by the RCDF and, in a modified form, in this report, will enable us to get a sense of the bigger picture of the contribution of these sectors to the regional economy.

In scanning the resource base and analysing data and indicators at every stage of the chain or cycle we are able to identify strengths and weaknesses together with those points at which more research may be necessary in order to understand, analyse and grow the cultural sector and the cultural and creative industries. The RCDF provides a conceptual framework - a 'map'- for a knowledge base for the cultural sector which is also a diagnostic policy tool and which, in its simplest form, looks like the matrix on the following page. This matrix provides 42 cells or 'boxes' to be filled with data, information and knowledge from various sources.

At best we only have quantitative data sources available from national statistical agencies to partially fill about 23 of these 42 boxes. Those domains or sub-sectors which are made up of predominantly commercial activities – Audio-Visual, Books and Press, Sport and Tourism – are best served by statistical data across the chain. In the subsidised parts of the cultural sector – with the exception of the Libraries, Museums and Archives (LMA) component of the Heritage domain, data is much less readily available. Where it is available, it is in a form that is not sufficiently refined to differentiate between, for example, different types of creative production.

THE RCDF MATRIX

THE VALUE PRODUCTION CHAIN OR 'CULTURE CYCLE'

DOMAINS

	CREATION	MAKING	DISSEMINATION	EXHIBITION & RECEPTION	ARCHIVING & PRESERVATION	EDUCATION & UNDERSTANDING
VISUAL ART						
PERFORMANCE						
AUDIO-VISUAL						
BOOKS AND PRESS						
HERITAGE						

SPORT						
TOURISM						

In this report we use this matrix as a basic tool for evaluating the availability and 'fit' of appropriate, robust and useable data and other research-generated information. It allows us to 'map' available sources against the RCDF and, further, to suggest areas in which more work of a quantitative and qualitative nature needs to be done. We return to this matrix later in the report in Section 2.9.1 (p. 36).

1.1.2 Summary of strengths and weaknesses

1.1.2.1 Regional capacity that needs co-ordination

There is good to strong regional research *capacity* in government agencies and programmes, industry support agencies and in the Higher Education sector but relatively weak *co-ordination* of research efforts partly due to poor sector definition. Poor sector definition is, in turn, partly produced by lack of appropriate and available quantitative and qualitative data and information about the sector. This is a self-confirming (and self-denying) circle – we don't know enough about the sector to define its contribution to broader strategic regional objectives – which needs urgently to be broken.

The strong research orientation of Culture South West and its various stakeholders as well as the consolidation of new regional intelligence and research mechanisms such as the South West Observatory and the South West Intelligence Database (SWID) and the partnerships this involves between the HE sector and regional agencies – eg. the Skills and Learning Intelligence Module (SLIM) of the South West Observatory at Exeter University, the Business and Economy Module at the University of Plymouth – all provide examples and mechanisms for breaking the circle.

At the time of writing a team of researchers has been appointed by CSW and SWRDA for a regional creative industries mapping and impact study that should greatly enhance the knowledge base and provide strategic guidance for future research efforts. We also note that a position of Research Officer: Cultural Sector (South West) for CSW located with the Core Unit of the South West Observatory in Taunton is being advertised. Both of these initiatives will provide a significant contribution to the knowledge base for the cultural sector and to its ongoing maintenance in the work of co-ordination and leverage of regional research capacity.

1.1.2.2 Sector specific research

Among the regional sector-specific agencies there is a good research track record for South West Screen, South West Museums Libraries and Archives Council (SWMLAC), South West Tourism and Sport England (South West). The picture for the more traditional arts sub-sectors (Visual Art, Crafts, Performance – including music) and for Heritage more generically defined is less comprehensive at a regional level but appears to be developing more strongly as regionalisation becomes a reality. There are important strategic weaknesses, however, in some crucial sub-sectors because of weak ‘industry’ definition and lack of the statistical means for evaluating them. These include craft, design, creative new media and cultural tourism.

1.1.2.3 Sub-regional research

At sub-regional level there has been a good deal of research undertaken to various ends including the development of local cultural strategies, Best Value Reviews, Comprehensive Performance Assessment and, of course the preparation of Bristol’s bid for 2008 *European Capital of Culture* status. The larger cities and unitary authorities have undertaken arts and creative industry mapping and impact assessments (Plymouth, Swindon, Exeter) and comprehensive work of this type has also been undertaken at County, Borough and District levels in e.g. Cornwall. At the time of writing, creative industries mapping and economic impact assessment is imminent across Somerset.

1.1.2.4 Summary of research quantum by level and sub-sector

Of the research documentation received and/or noted the following is the breakdown in percentage terms:

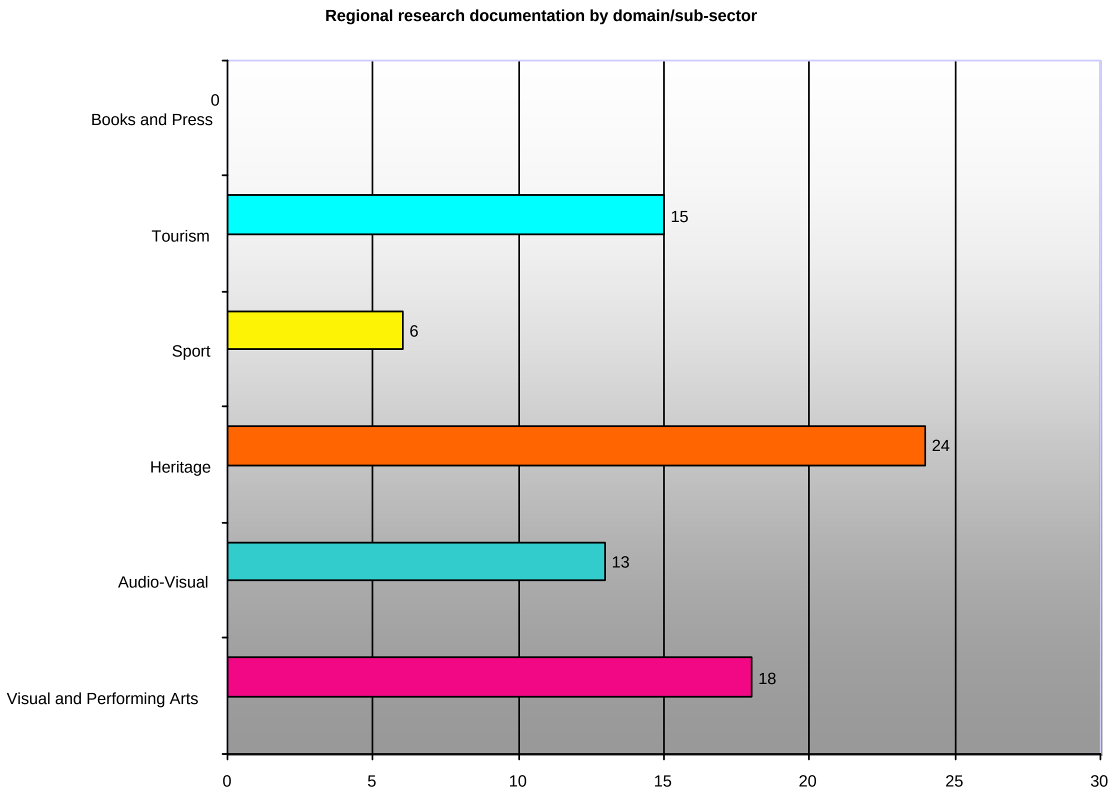
Documents principally of regional significance	**30%**
Documents principally of sub-regional or sub-sectoral significance	**50%**
National documents with regionally specific data	**20%**

(*All documents received and noted, including web sites where available, are listed at Appendix 1*)

The ‘spread’ of documentation here does not provide a basis for any firm interpretation of strengths and weaknesses in cultural sector research in the region.

The relative youth of the regional agencies – or their more recent re-engineering with new briefs and jurisdictions - would account for the lower percentage of regional documents compared to sub-regional. Sub-regional documentation has also certainly been boosted over the past 3 years by the development of cultural strategies, Best Value Reviews and Comprehensive Performance Assessment.

Of the regional documents, the breakdown by domain or sub-sector is probably more instructive as shown in the following chart.



Again, no hard and fast conclusions can be derived from this spread. The lead taken by the Libraries, Museums and Archives (LMA) sector is partly accounted for by statutory reporting requirements for publicly funded collecting institutions and also to a commendable commitment to ongoing research and data capture mechanisms. The complete absence of any available or public domain research for Books and Press is largely due to the fact that this is the biggest and most commercially robust of all creative industries and is well beyond the research and development stage. Tourism's high count is also partly accounted for by its derivation of regionally specific visitor data from established national data sources. As an example of local best-practice, however, we note the publication, during the writing of this report, of the *Penwith Cultural Tourism Report* for Penwith District Council by Perfect Moment Ltd. This provides an approach to the relationship between cultural assets and tourism which could – and should – be applied at regional level in ways that we suggest towards the end of this report.

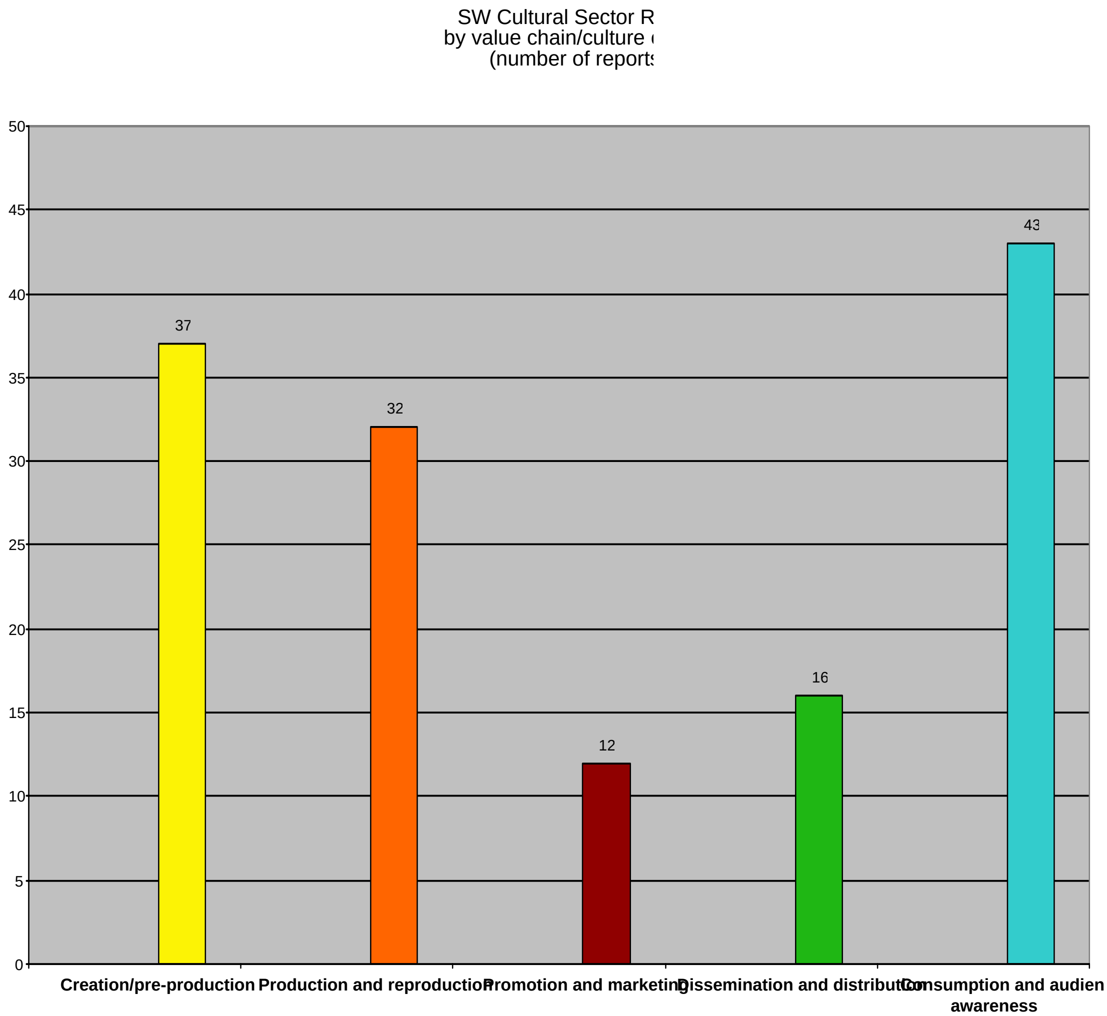
The relatively low counts for Sport and for Heritage (apart from Libraries, Museums and Archives) are partly related to the structure and governance of the national organisations and to the fact that they are relative newcomers to the process of regional devolution and are adjusting differently to regional imperatives. At the time of writing, however, we note the publication by Sport England (South West) of a major study of the economic contribution of sport to the regional economy undertaken by Cambridge Econometrics.[3] To our knowledge there appears to be no equivalent at regional level for Heritage (apart from the LMA sector) or, at least in a consolidated and readily available form, for Tourism.[4]

The 'dots' are, however, getting more numerous, spreading in interesting patterns and beginning to make their own connections sometimes in *ad hoc* and sometimes in more co-ordinated ways. But this process will take a long time to develop coherently on its own momentum without unnecessary duplication of efforts and a consistent approach to evidence-based policy. There is a strong need, in this context, for regional leadership in cultural sector research. This will require a robust and clear *conceptual framework* for research (the basis of which is provided by the RCDF) as well as a greatly enhanced quantitative and statistical basis for collecting and analysing the relevant primary and secondary data

1.1.2.5 Summary of research efforts against the value production chain or 'culture cycle' model.

A starting point for this clearer conceptual framework and for developing regional leadership is provided by an analysis of research efforts against a value production chain model as advocated in the RCDF but slightly modified here. The distribution in terms of number of reports for each stage of the chain is shown in the following chart:

[3] Cambridge Econometrics (2003*) The Value of the Sports Economy in the Regions: The Case of the South West*. Final Report. Sport England, South West.
[4] The *SWRDA Priority Sectors Working Paper 8: Tourism and Leisure* (2000) which includes cultural sector data provides a useful and strategically oriented overview and analysis and appears to be the most consolidated piece of research for the Tourism sub-sector.



The value production chain has been modified for the purposes of this chart - and elsewhere in this report to a five stage model. A rationale for this modification of the RCDF six stage – or function – model to a five stage model is given in the final section of this report (pp48-50). Again, caution in interpretation is necessary: *quantity of reports does not equate to quality of research*. But the trend is instructive in some ways. There is a good quantum of work at stages 1, 2 and 5 of this chain but less of a presence at stages 3 and 4. These can be described as concerned with 'getting the message, the knowledge and the product out' in both tangible and non-tangible forms and there appears to be a relative weakness in the value chain at these points. Relevant data and information in these categories would include, for example, marketing and promotional spend as a percentage of total outlays by companies and organisations, range and nature of agencies, venues and networks for dissemination and distribution.

These weaknesses noted, however, the spread across the value chain or culture cycle is reasonably distributed in terms of research 'inputs'. This does not necessarily mean, however, that 'outputs' in terms of an evidence base for policy are either coherent or add up to a comprehensive picture of the South West cultural sector.

2.0 ANALYSIS: THE DOTS - WHERE AND WHAT ARE THEY?

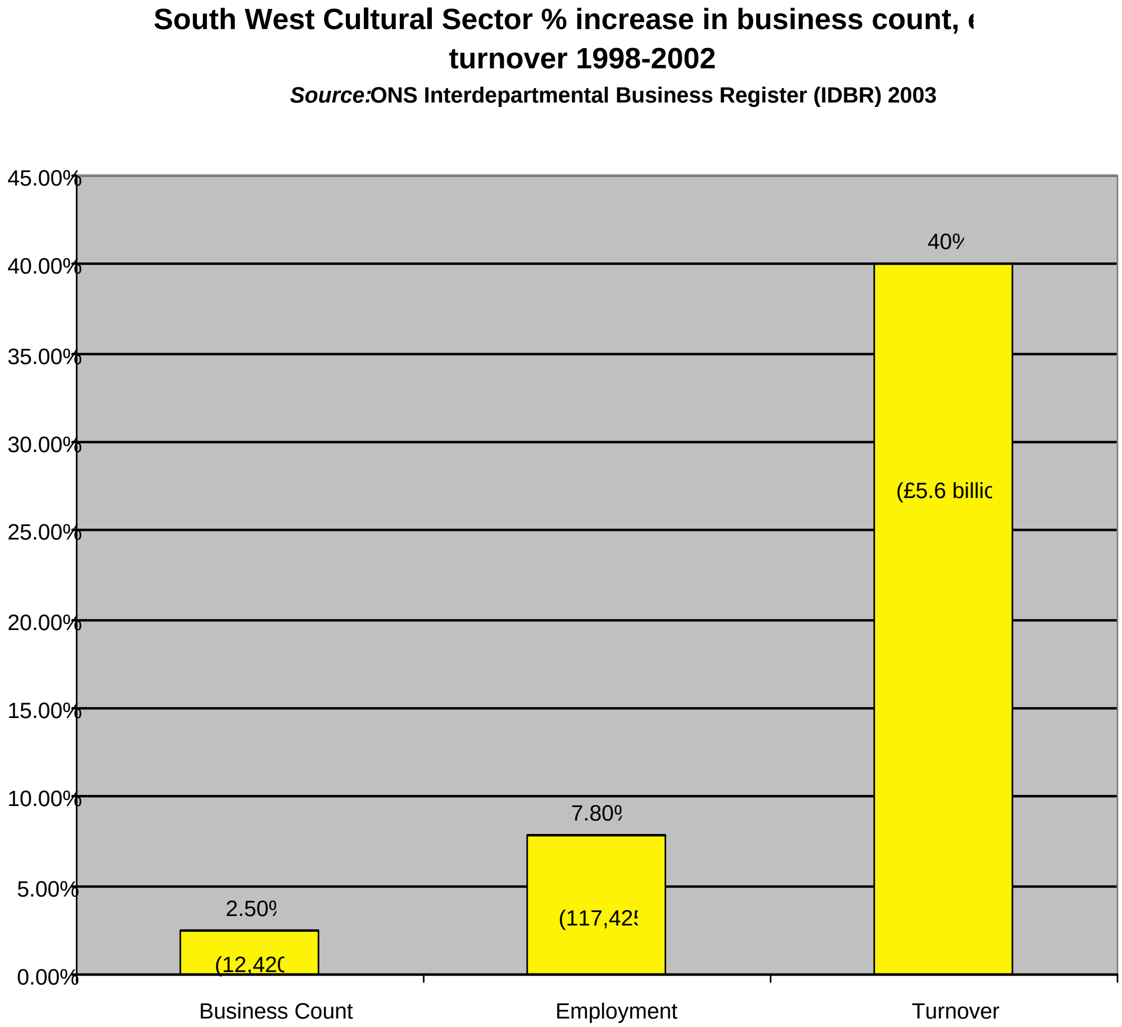
2.1 REGIONAL OVERVIEW

Based on the RCDF and other sources, and to establish a quantitative baseline from which to work, we commissioned National Statistics to provide data based on their Interdepartmental Business Register (IDBR) on business count, employment and turnover for the cultural sector as defined by the available Standard Industrial Classification (SIC) codes in the RCDF. These are listed at *Appendix 3*. The count was for the years 1998 and 2002.

Note: this is a preliminary ‘snapshot’ only. It is based on the SIC codes identified in the RCDF which, as both that report and we note, are subject to a great deal more refinement. The regional creative industries mapping and economic impact assessment project commissioned by SWRDA and CSW in August 2003 will contribute significantly to this.

2.1.1 Cultural sector business count, employment and turnover 1998-2002

For the seven domains of the cultural sector as a whole, the comparative figures for business count, employment and turnover increase 1998-2002 are represented in the following chart:



These figures are healthy and significant, especially in turnover increase. *At a minimum* there are 12,000 companies employing 117,000 people turning over £5.6 billion in 2002.

These are statistics available at the 'production' end of the value chain. Quantitative and qualitative figures on participation (consumption) and attitudes are less readily available but we extract those that are available in the next section.

2.1.2 Participation and attitudinal data and indicators

2.1.2.1 Family expenditure on leisure goods and services

Family expenditure on leisure goods and services (including books, television, cinema, theatre, sports and other attendances and holidays) is a significant contributor to national and regional Gross Domestic Product (GDP). At UK level, for example, leisure goods and services constitute the third largest (aggregated) expenditure category as follows:

Food, drink and tobacco	£83 per week
Housing, fuel, power	£76 per week
Leisure goods and services	£70 per week.

Families in the South West region come fourth overall (£62) in the leisure goods and services expenditure categories after London (£82), South East (£75) and East (£65) regions

Source: National Statistics, *Family Expenditure Survey 1998-99 – 2000 -01*

2.1.2.2 Attendance at artistic and cultural events and participation in cultural activities

Artistic and performance events

People in the South West are in the highest three groups for percentage attendance at artistic and cultural events in the last year with 82% attending. This is equivalent to London and only exceeded by the South East at 83%. The UK median is 80%

The South West has the highest participation rates in:

- Craft exhibitions (22% - 17% for England)
- Carnival, street arts and circus (33% - 23% for England)
- Buying original art works (10% - 6% for England)
- Buying original/handmade crafts such as pottery or jewellery for themselves (14%, equal to London - 12% for England).
- Dance, drama and voluntary arts activities (5% - 4% for England)

Usage of and attendance at libraries and museums in the South West are at the national average of 46% and 34% respectively.

Source: The Arts Council of England and *re*:source (2002) *Arts in England: attendance, participation and attitudes in 2001.*

The (rounded) participation rates, in order of popularity of event, against GB figures for ‘All Adults’, are as follows:

	South West	GB
Cinema	57%	56%
Plays	24%	23%
Art Galleries/exhibitions	22%	22%
Pop/rock	22%	22%
Classical music	13%	12%
Ballet	7%	6%
Opera	7%	6%
Contemporary dance	5%	4.5%

Source: Arts Council of England, (2002), *Target Group Index* 2000/01+20001/02

Museums, Heritage and Tourism

- In 2000-01 museums in the South West attracted 5.5 million visitors.
- In 2001 the South West recorded the highest number of visits by UK tourists to ‘artistic and heritage centres’ of any English region (including London).
- Nearly 86,000 people used archives in the region in 2001-2002.
- Nearly 20 million UK residents and 1.4 million overseas residents visited the South West in 2001. They spent nearly £3.8 billion.
- The South West has three of the top tourist attractions in the country in the Eden Project, the Roman Baths in Bath and Stonehenge.
- The South West has more heritage coastline than any other region.

Source: SWMLAC (2002) *Mapping Trends in South West Museums*; *Tourism Facts, South West* 2001: *UK Tourism Survey* 2001.

Sport

- Sport employs nearly 40,000 people in the region and generates £2.5 billion[5] in annual turnover. This is 1.5% of the regional economy, slightly lower than the national figure at 1.75%

[5] This figure, generated by the Cambridge Econometrics report cited is significantly higher than that generated by the RCDF framework.

- South West residents spend £1 billion annually on sports related goods and services. This is about 2.5% of total household spending, lower than the national figure at 3%.

- Around 575,000 people participate in organised sports clubs.

- High profile sports events attract 920,000 people and £72 million into the region from elsewhere. This is a larger number of people than for any other English region.

- People in the South West spend more money each year actively participating in sport than attending or viewing sport in the media.

Source: Cambridge Econometrics (2003) *The Value of the Sports Economy in the Regions: The Case of the South West* - Final Report

The figures in 2.1.1 and 2.1.2 are useful but essentially 'headlines' only for which the main article has yet to be written. Taken with the figures on business count, employment and turnover noted above they do tend to indicate some positive growth trends in both production and consumption.

But the overall picture, from a regional point of view, is still radically incomplete and we turn now to the 'gaps' in the picture.

2.1.3 Gap analysis

2.1.3.1 Quantitative gaps

The most significant quantitative gaps in the knowledge base for the cultural sector as a whole can be summarised as follows:

- *Annual Business Inquiry* (ABI) and *Interdepartmental Business Register* (IDBR) data based on Standard Industrial Classification (SIC) codes tend to cover only registered and VAT-returning businesses. They do not cover the non-VAT returning (businesses or individuals with an annual turnover of less then £56,000) self-employed people, or freelancers. Given the known high proportion of these people in the cultural sector generally and, especially in Visual Arts, Performance, Crafts, and, to a lesser extent, Audio-Visual sub-sectors, the figures reported for business count, employment and turnover are certainly significant under-estimates. In addition Census and *Labour Force Survey* (LFS) counts are based on principal occupation. If a person's principal occupation is as a teacher but that person is also a visual artist, designer, musician, part-time sports referee or also owns a tourist guest house, the latter activity does not get counted.

- Internal to the system of industrial classification used by National Statistics, from which ABI and IDBR data sets are derived, are two key problems. These are:

    i. the lack of sufficient differentiation in cultural occupations such as ‘Artistic and Literary Creation’, (the inability, for example, to distinguish between playwrights and authors or dancers and musicians
    ii. the non-existence of appropriate definitions for areas such as Design, Crafts and Creative New Media. There are, for example, no SIC codes available which would enable the identification and counting of fashion, graphic, interior or product designers.

- Where regionally specific figures exist these tend to be fullest at the consumption end of the value chain – users, visitors, attenders, participants, etc. While this is useful information, it tends to be driven by a reporting/performance indicator/justification agenda. This is not a problem in itself but it is a narrow approach to the ‘uses of culture’ and there is a need for harder data on the correlations between uses and non-uses of culture and other factors such as socio-economic status, ethnicity etc., and community participation, generation of human and social capital, and quality of life. We address these issues in more detail below. Participation rates in various cultural activities correlated to gender, social grade category and age are collected at regional level by BMRB International Limited and provided to clients such as Arts Council England and *re*:source but these are not publicly available.

2.1.3.2 Qualitative gaps

The qualitative gaps are essentially in the research *agenda* and *infrastructure* rather than in our capacity to generate the data from qualitative research and translate it onto quantitative, policy-relevant, policy-enabling, evidence-based, and regionally specific forms. These gaps can be summarised in the following terms.

- The absence, at regional level, with one sub-regional exception (Bristol) and one sub-sectoral exception (Libraries, Museums and Archives within the Heritage sub-sector), of any attempt to link cultural statistics to quality of life indicators or other qualitative issues such as social inclusion and cultural diversity. National, regional and local quality of life indicators have been published in abundance by the Office of Deputy Prime Minister (ODPM) over the past three years but they include no specific cultural indicators or any indicators from the cultural sector which could be integrated in to the overall framework. While Best Value Performance Indicators (BVPIs) and the criteria used for Comprehensive Performance Assessment (CPA) include some cultural criteria they are fairly limited.

- There is an opportunity, in the South West and in the context of the current development of the *Integrated Regional Strategy*,[6] for a fuller integration of cultural statistics and indicators into these broader agendas (as, for example, with the *Time for Measuring Culture* framework developed in the East Midlands in 2003)[7]. The connections between cultural participation and, for example, community cohesion, recognition of diversity, training and job prospects, and the sustainability of regeneration initiatives, are all measurable in principle and there are examples of good practice in this field from elsewhere in the UK and overseas, especially in Canada and Australia. This work – connecting cultural capital to its economic, human and social forms has yet to be initiated in the region.

- The above point concerns essentially the integrity and robustness of the research agenda. A further important issue, from the point of view of policy and planning, is the extent to which, even where data is available, there is a need for a value-adding and policy-informing move from data to indicators to knowledge to benchmarks and policy. This is so that we can know that a given input to the arts, heritage, sport, tourism training can have some plausible and demonstrable output or outcome. This might be developing capacities, and adding value to those capacities in production, reproduction and dissemination. Or it might be through ensuring that there is adequate knowledge of and access to these opportunities, and that a sufficient demographic number and range is enabled to witness and consume the outputs of these capacities to defined policy ends. The potential for this sort of policy-informing and policy-enabling 'input-throughput-output analysis' is there, however, in ways that we outline below. This issue draws our attention to the fact that it is not simply the research agenda that is in need of some re-engineering but also the 'architecture' of the policy framework which is informed by the research.

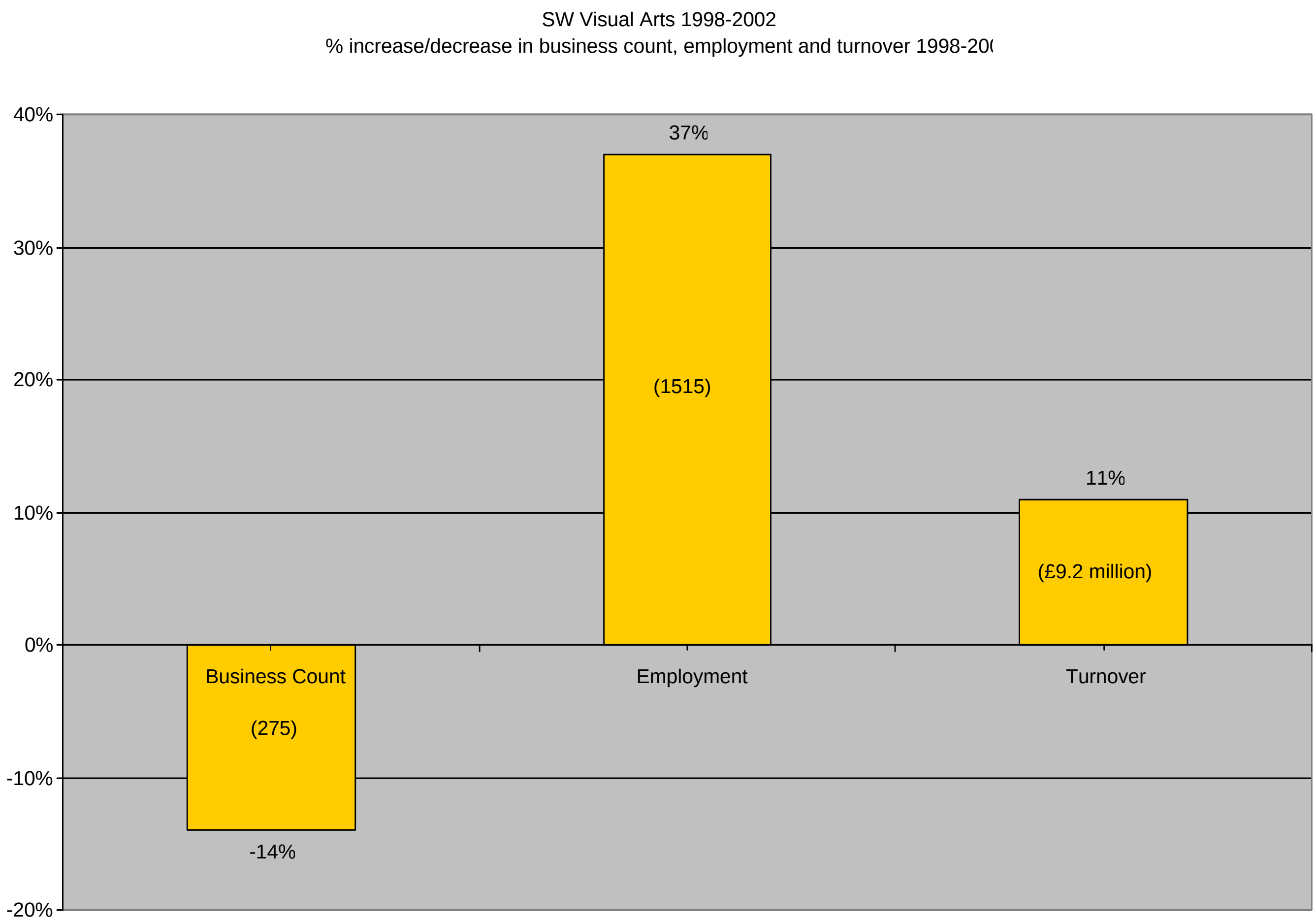
[6] The framework linking all regional strategies being developed by the South West Regional Assembly.
[7] This framework was commissioned by the Regional Cultural Consortium (Culture East Midlands) specifically to integrate cultural indicators with others set out in the East Midlands Regional Assembly's *Integrated Regional Strategy*.

2.2 VISUAL ARTS

The Visual Arts sub-sector or domain includes those in employment whose principal occupation is counted in the five digit SIC code 92.31/2 (visual artists) and in the five digit SIC code 74.20/1 (creative personnel in architecture). It does not include intermediaries and retailers in the 'Art and Antiques Market' (an important DCMS Creative Industries group), designers other than architects and craftspeople. Nor, we recall, does it include visual artists who are not registered or VAT-returning businesses.

On this restricted count, however, the 1998-2002 growth figures are nonetheless positive in employment and turnover counts as the following chart shows.

2.2.1 Visual arts sub-sector business count, employment and turnover 1998-2002



Source: National Statistics, Interdepartmental Business Register (IDBR), 2002

The business count is a negative figure with a 14% decrease in the number of registered businesses. From a sub-sectoral and regional point of view, however, this is probably more than compensated for by a 37% increase in employment and 11% increase in turnover to a 2002 figure of £9.2 million. Given that this does not include the turnover of the hundreds of public and commercial galleries in the region, this is a significant underestimate of the real figures for the region.

Regional mapping research of the crafts sub-sector undertaken by South West Arts (now Arts Council England, South West) and published in 2002 indicates that substantial numbers can be added to the above when these included in the picture. *the real world/a prospectus for the crafts in the south west* provides the following estimates for the South West:

- 5000 craft makers
- 75% of makers established for more than 10 years (based on a survey of 520)
- Majority of makers trained in Further and Higher Education institutions
- Majority of makers working from home.
- 20% of galleries selling craft product have turnover of £100,000.
- Craft sales contribute £13 million to regional Gross Domestic Product (GDP) with turnover in the region of £30-£50 million.

2.2.2 Participation and attitudinal data and indicators

These figures are thin on the ground in the South West and, in general, have to be extracted from the regionally specific national data sources identified above. These include:

- Highest % regional participation rate in Craft exhibitions (22% against 17% for England)

- Largest regional percentage of people buying original art works (10% against 6% for England)

- With London and the South East, the highest percentage of people buying original/handmade crafts such as pottery or jewellery for themselves (14% against 12% for England).

- With the Eastern and London regions, the South West has the highest rates for participation in the category 'Painting, drawing, printmaking or sculpture' (16% against 14% for England)

- Art galleries/exhibitions as the third most popular cultural event (22% attendance) after Cinema (57%) and Plays (24%), and equal with Pop/Rock (22%))

2.2.3 Gap analysis

2.2.3.1 Quantitative gaps

As the above figures suggest, the gaps here are, in effect, *chasms*. The RCDF only identifies employment count, business numbers and turnover calculation bases for visual artists and designers in architecture at the 'Creation' stage of the value chain. All other functions – supply of artists materials, production of artefacts, sale and resale of art works, education and training in visual arts – are not countable and are covered, in the RCDF, by the ubiquitous acronym NFW ('needs further work').

On a simple statistical count basis, this excludes:

- The majority of craft workers
- The majority of graphic designers, fashion designers, industrial designers, furniture designers, product designers, interior designers, web designers.
- Galleries, fairs, festivals, markets as points of sale and consumption
- Conservators and restorers

2.2.3.2 Qualitative gaps

Quantitative gaps tend to produce qualitative gaps. Where facts don't exist people tend to tell stories. In this sub-sector (as in others) we need much more regional information about the following qualitative factors:

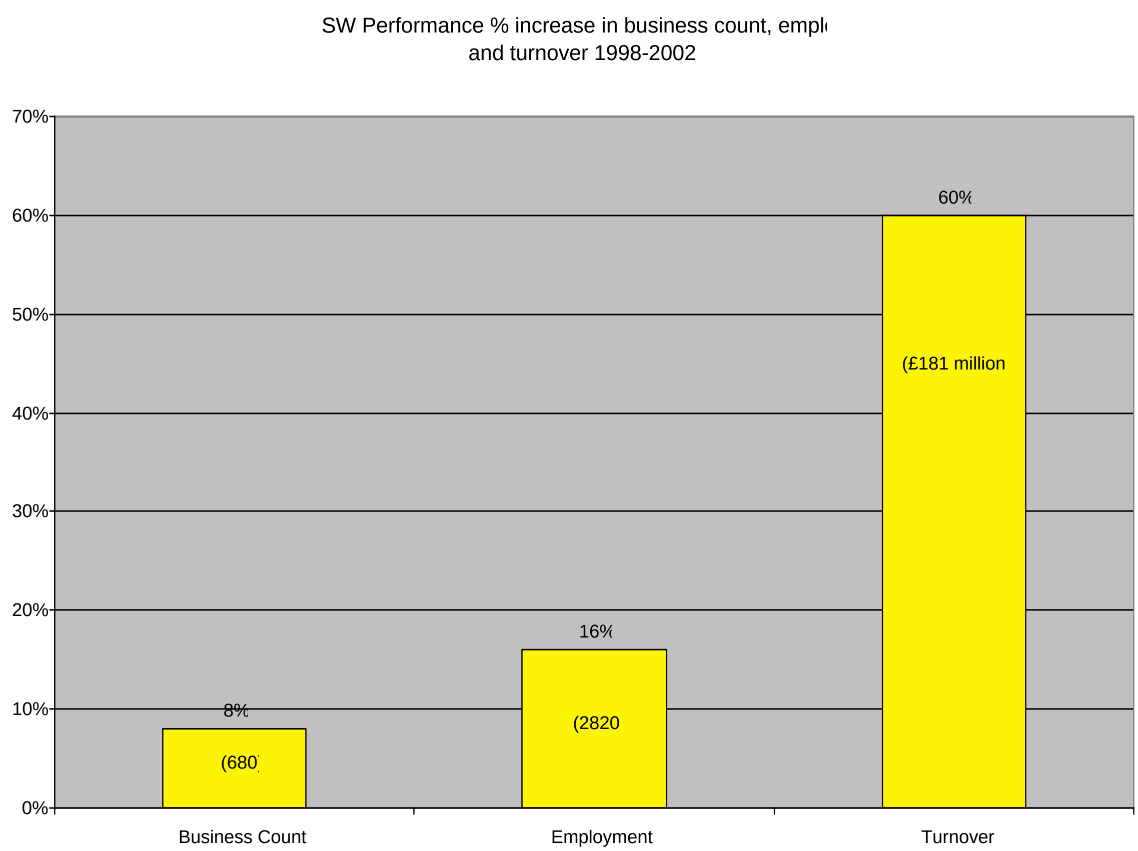
- Why people choose to be in, stay in or relocate to the South West (and by sub-region)
- The tourism/visitation potential of the sub-sector
- The market and purchasing trends and preferences for the products of the sub-sector.
- The relationship between product output and regional image/identity.

2.3 PERFORMANCE

Performance in the RCDF is also poorly served by available national data sets. The key content originating (creation) functions of play-writing and scenography, for example, are not covered by SIC codes. We cannot know, on current counts, how many people work – even principally – in this area in the region. People on payrolls working in 'Live theatrical presentation' are counted under the five digit SIC code 92.31/1 but we have no means of counting people involved in the dissemination of performance product or the many other intermediaries who might be involved, for example, in taking a production or performance to the national or international cultural marketplace.

The regional figures for Performance are, however, positive as the following chart shows.

2.3.1 Performance sub-sector employment, business count, and turnover 1998-2002.



Source: National Statistics, Interdepartmental Business Register (IDBR), 2002

Again, even on a restricted count basis (but including dance halls, discotheques and dance instructor services and other entertainment services including circus and puppetry), the figures are positive with an 8% business count increase, 16% employment increase and 60% turnover increase. The overall figures are very positive.

2.3.2 Participation and attitudinal data and indicators

As with Visual Arts, reliable participation and attitudinal data is sparse at national and regional levels. What is available tells us that the South West has:

- the highest regional participation rates in 'Carnival, street arts and circus' (33% against 23% for England).
- the highest regional participation rates in 'dance, drama and voluntary activities' (5% against 2% for London and 4% for England)
- 24% annual participation rates in 'plays' (against 23% for GB)
- 22% participation rates in 'pop/rock' (equivalent to the national rate)
- 13% participation rates in 'classical music' (against 12% for GB)
- 7% participation rates in 'ballet and opera' (against 6% for GB)
- 5% participation rates in 'contemporary dance' (against 4.5% for GB)

Source: The Arts Council of England and *re*:source (2002) *Arts in England: Attendance, participation and attitudes in 2001.*

2.3.3 Gap analysis

2.3.3.1 Quantitative data

Nationally available and regionally specific data for this sub-sector is confined to four SIC codes for 'Live theatrical presentation', 'Operation of arts facilities', 'Dance halls, discotheques and dance instructor services' and 'other entertainment activities. (including circus and puppetry). Playwrights, scriptwriters, scenographers, impresarios, ticketing agencies, etc., are not countable in the currently available statistical categories. There is no differentiation between lighting technicians and actors in the 'Live theatrical presentation' group and there is no count available for people who educate, train and instruct in this field.

In sum:

- Dancers cannot be differentiated from actors or from opera singers

- Playwrights cannot be differentiated from other literary creators

- Technical and administrative staff cannot be differentiated from creative staff.

2.3.3.2 Qualitative data

The qualitative data issues here are essentially the same as apply to the Visual Arts sub-sector and are repeated here:

- Why people choose to be in, stay in or relocate to the South West (and by sub-region)

- The tourism/visitation potential of the sub-sector

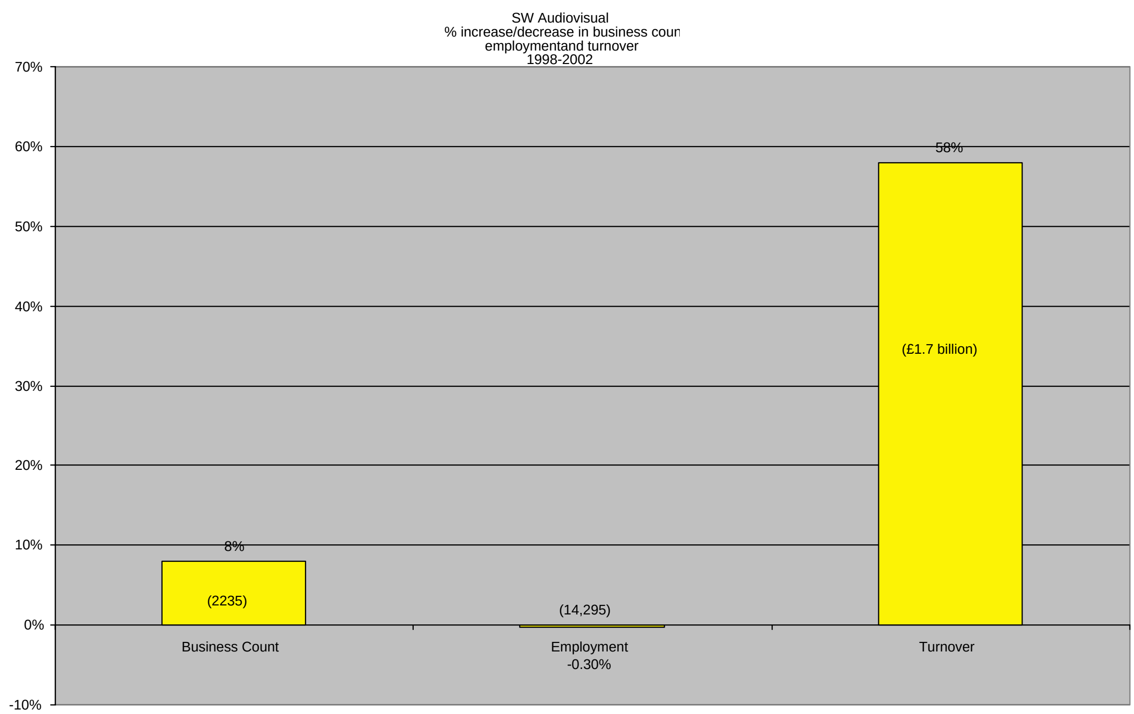
- The market and purchasing trends and preferences for the products of the sub-sector.

- The relationship between product output and regional image/identity.

2.4 AUDIO VISUAL

This sub-sector, being more fully commercial in its orientation, is much better served by industry data though it is not possible, within the current SIC codes, to differentiate between creative and technical inputs. Nor is it possible to identify the increasingly important group of people involved in leisure software design and development as either creators or publishers. The sector shows growth in business count and turnover with a small decrease in employment as shown in the following graph.

2.4.1 Audio-Visual employment, business count, and turnover 1998-2002



Source: National Statistics, Interdepartmental Business Register (IDBR) 2002

This sub-sector includes radio, television and film/video production and distribution, the manufacture of media and materials related to these activities, photographic activities, recorded music and also, significantly, leisure and interactive software and advertising. In terms of data availability it has one of the most complete data sets available for the cultural sector. The turnover growth rate of 50% over the past 5 years is significant as the Audio-Visual sector is frequently recognised as a key driver for creative industry development at regional and sub-regional levels.

2.4.2` Participation and attitudinal data and indicators

Beyond the Target Group Index 2002 (TGI) figure of 60%, cinema attendance for 'All adults' in the region (the highest of any region outside Greater London), there is no relevant or readily available participation and attitudinal data for this sub sector. Relevant regional data is likely to be embedded in commercial market research and viewer and listener surveys but these are not in the public domain.

2.4.3 Gap analysis

The bulk of the work in this area has been undertaken on skills and training needs and economic impact studies of film and television production at regional and sub-regional levels. The sub sector is relatively well-served by some 13 reports of this type at regional and sub-regional levels between 1999 and 2002.

There are, however, further key and strategic areas where work needs to be done in the sub sector as follows:

- The implications of digitalisation and convergence for the sub-sector in terms of current and future employment trends, business location issues, and links to regeneration;

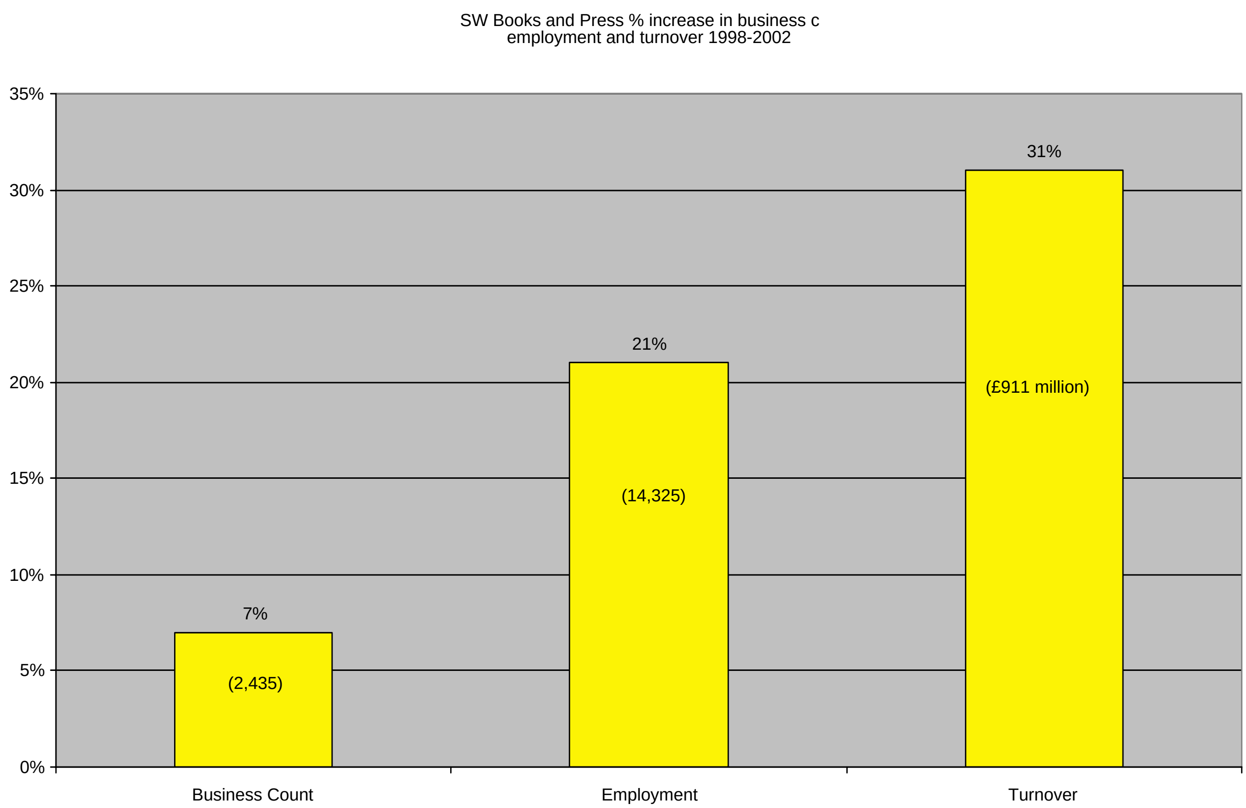
- The nature of education and training for both production *and* consumption in film and broadcast media, and;

- The connections between the sub-sector as a whole and regeneration initiatives at regional and sub regional levels.

2.5 BOOKS AND PRESS

This is the most economically robust and, in industry terms, the most mature of all sub-sectors and we have discovered no regionally specific research relevant to the sub sector. The Standard Industrial Classification (SIC) codes for the sub-sector cover authors who have identified this activity as their principal employment but do not cover, for example, academic authors who will be identified under the Further and Higher Education code or part-time authors whose principal activity might be in other work. J.K.Rowling, for example, would not have been counted when she was writing the first Harry Potter book while receiving benefits and Fay Weldon would not have been counted when she was working for an advertising agency. Simon Schama and David Starkey, both prolific authors, would not have been counted because their principal employment is as academics. Publishing and retail sale of books is covered by a SIC code but there is nothing which accounts for the activity of literary and book fairs and festivals or education and training in journalism, creative writing, printing, publishing, literary criticism, etc.

2.5.1 Books and Press employment, business count, and turnover



Source: National Statistics, Interdepartmental Business Register (IDBR) 2002

What we might call the 'Waterstone effect' of the steady and often exponential growth in book sales, especially, is worthy of attention and research in this context. It is clear that this first of the 'cultural industries' dating from the late 15^{th} Century continues to develop and grow steadily. Far from the predicted decline in traditional reading habits due to the introduction of digital new media, it is clear that there has been a steady increase in both publishing and reading activities over the past 5 years.

2.5.2 Participation and attitudinal data and indicators

From a policy point of view it is important to note that there is a demonstrable and positive relationship between book buying and book borrowing with 62% of library visitors having purchased fiction against 38% of non-visitors. It is also clear that there is a strong connection between uses of a library and activities of literary creation with 78% of respondents in an Arts Council/re:source survey having written a story or play (against 22% of non library users) and 70% having written poetry (against 30% of non users).[8]

In terms of the readership of different genres, the same survey (of 6,042 people) records the following national figures[9]:

➢ Work of fiction, play, novel or story	58%
➢ Non-fiction/factual	38%
➢ Biography	25%
➢ Poetry	8%
➢ Other	2%

2.5.3 Gap analysis

At the regional level there is no equivalent of the national data presented above and it would clearly be useful, for the Library and Archives domains in particular, to have access to regionally specific data of this type. It would also be useful to know the extent to which literature of various types *about* the region or which has a South West regional *ethos* is in demand given the strong emergence of various 'niche publishing' trends in both books and magazines.

From an industry point of view, the market and consumption trends in the region would clearly be useful and, given the patterns of industry restructuring and the significant growth at the demand/retail end of the value chain, it is likely that convergence and digitalisation will produce new research needs which are both regionally specific and regionally comparable.

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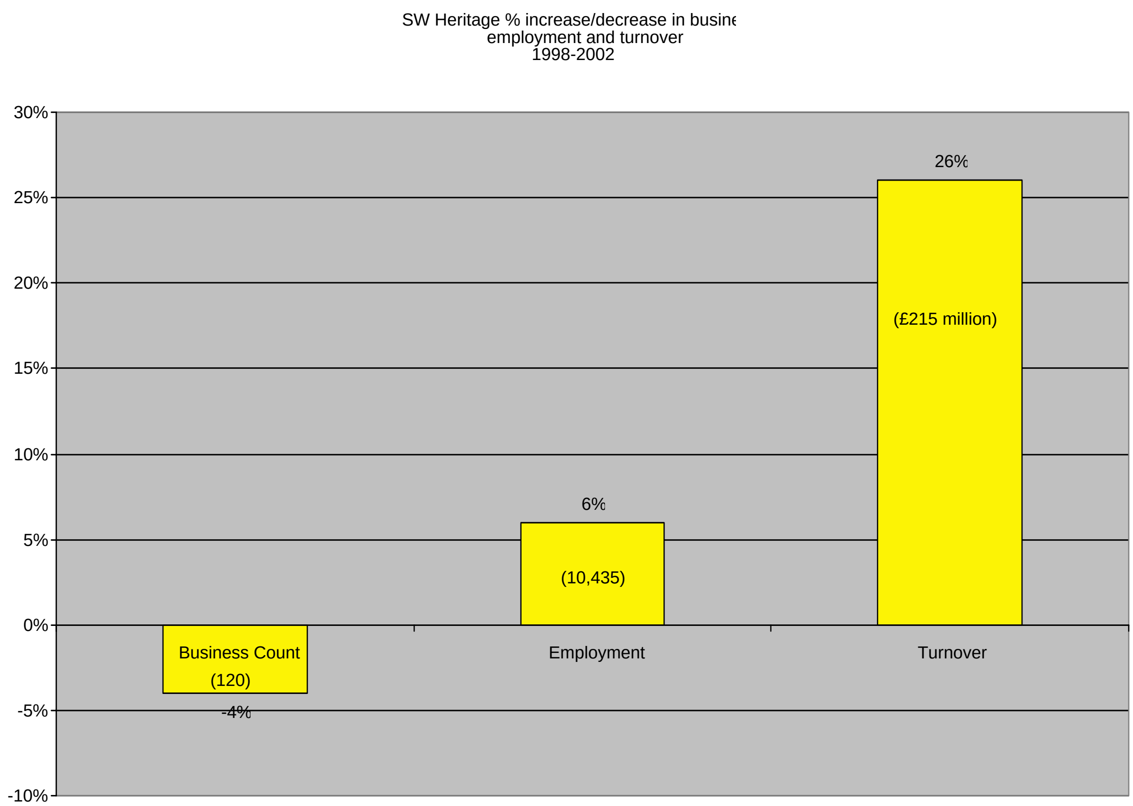
8 Arts Council of England and *re*:source, *Arts in England: Attendance, participation and attitudes in 2001*, pp.81-82.

9 Arts Council of England and *re*:source, *Arts in England: Attendance, participation and attitudes in 2001*, p.29.

2.6 HERITAGE

The Heritage sub sector as defined in the RCDF comprises built and natural heritage, museums, library, and archive activities. The Standard Industrial Classification (SIC) codes for this sub-sector, as set out in the *Regional Cultural Data Framework* (RCDF) include people working in museums, libraries and archives, botanical and zoological gardens, in preservation of historic sites as well as in some areas of visual arts, books and press and audio-visual. There are some important gaps in the data sets, however, and these include people working in heritage, museum and tourism services who are responsible for 'creating' the product, idea or theme, people working in conservation science and restoration and, crucially, those people responsible for the various types of specialist education and training in this field.

2.6.1 Heritage employment, business count, and turnover



Source: National Statistics, Interdepartmental Business Register (IDBR) 2002

2.6.2 Participation and attitudinal data and indicators

At the regional level there is little public domain research on Heritage as such. There have been specific impact studies undertaken by private sector companies on sites such as Stonehenge. Work is underway in Cornwall on the economic impact of the potential listing of Cornish Mining as a World Heritage site[10] and on 'public product' (public realm infrastructure)[11]. Given the presence of three World Heritage sites (Stonehenge, City of Bath and the Jurassic Coast) it is surprising that there is not more consolidated research in this area given its strong relationship to the contiguous sector of tourism. It is clear that Heritage is an important draw and 'driver' for both tourism and more general evaluations of quality of life in the region. It also comprises a range of natural and humanly made assets which are deserving of more systematic evaluation, mapping and impact assessment.

The area is better covered regionally in the significant data sets produced at sub regional and regional levels for the Libraries, Museums and Archives (LMA) domains.

We note, from the national and regional data, that

- Usage of and attendance at libraries and museums in the South West are at the national average of 46% and 34% respectively[12].
- South West museums attracted 5.5 million visitors in 2001[13]..
- South West museums are estimated to have contributed around £18.6 million to regional GDP in 1998. [14]
- Frequency of visits to 'artistic and heritage attractions' by UK tourists in the South West make it the lead region in England (including London) [15]..

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[10] Atlantic Consultants (2003) *Cornish Mining World Heritage Site Bid Economic Impact Assessment: Final Report*, Cornwall Enterprise.

[11] Great Western Enterprise in association with GFA RACE, (2003) *The Public Product: an Economic Impact Model*, Cornwall Objective One Partnership.

[12] PLB Consulting Ltd (2002) *Users and Non-Users of Museums, Archives and Libraries*, Paper to Re;Source

[13] PLB Consulting Ltd (2002) *Users and Non-Users of Museums, Archives and Libraries*, Paper to Re;Source

[14] South West Museums Council (2000) *The Economic Contribution of Museums in the South West*, South West Economy Centre

[15] PLB Consulting Ltd (2002) *Users and Non-Users of Museums, Archives and Libraries*, Paper to Re;Source

2.6.3 Gap analysis

The sub sector is relatively well served by data but, at a regional level, there are some key and strategic weaknesses in:

- Knowledge of the impacts of built and natural heritage and its relationship both to tourism and to economic regeneration.

- Strategic overviews of the impact and significance of libraries and archives (though we note that studies are planned and underway).

- Research into intangible cultural heritage (folklore, customs, traditions, oral history, traditional songs, etc)[16]

- User and non-user surveys for the sub-sector as a whole and its constituent parts.

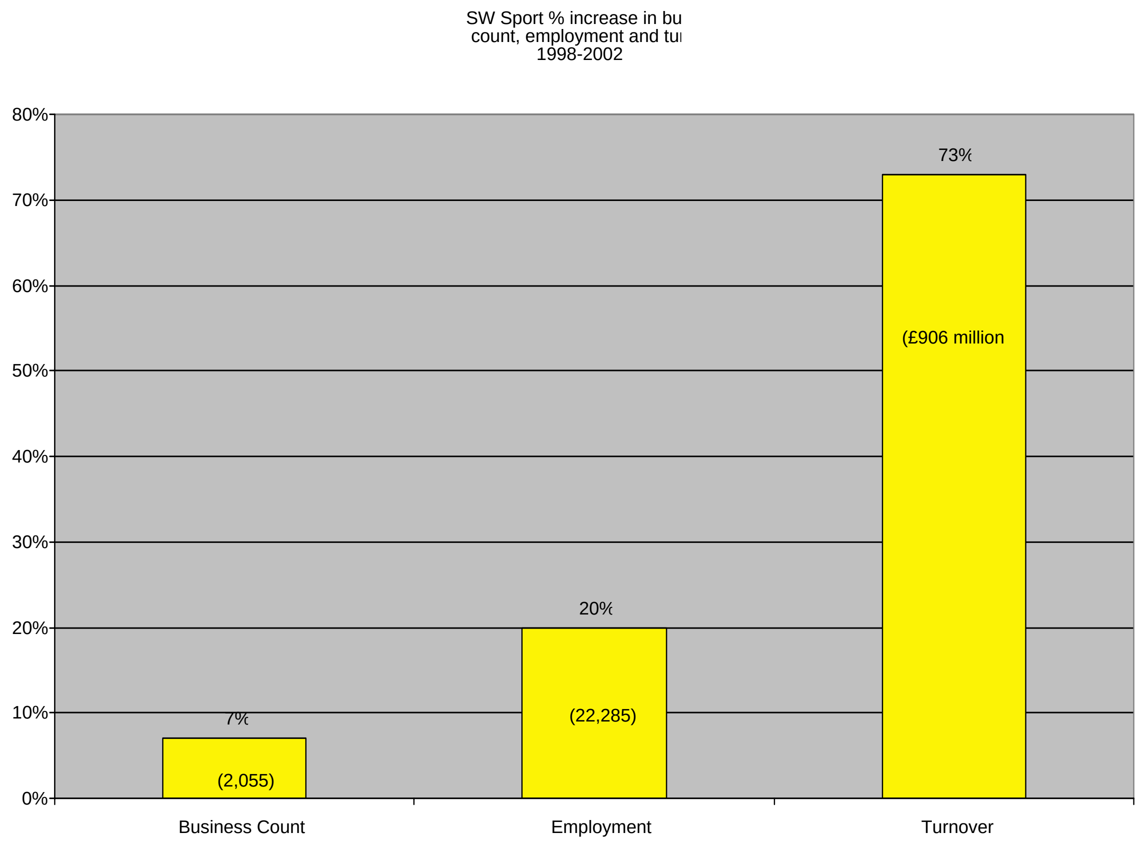
- The implications of convergence and digitalisation for the sub sector.

[16] A notable exception is the academic research being undertaken at the University of Exeter, especially in the Department of Geography by Dr David Harvey and his colleagues – see Appendix 1, items 153-156

2.7 Sport

There has been relatively little regionally specific research on the sports sub-sector but an economic impact study was published during the writing of this report.[17]. The analysis of employment in this sub-sector by Standard Industrial Classification (SIC) code is hindered by the absence of any data sets on people involved in the design and development of sports events and programmes, the activities of the high-growth sector of gyms and health clubs, and people involved in training, instruction and education in sports and the high profile activities of sports media. It is clear, however, that this is a high growth sector with significant patterns of growth in demand in both community and commercial sectors.

2.7.1 Sport employment, business count and turnover 1998-2002



Source: National Statistics, *Interdepartmental Business Register* (IDBR) 2002
Note: the turnover figure here at less than the £1 billion which was generated from the SIC codes for Sport in the *Regional Cultural Date Framework* (RCDF) is significantly

[17] Cambridge Econometrics (2003*) The Value of the Sports Economy in the Regions: The Case of the South West*. Final Report. Sport England, South West.

lower than the figure of £2.5 billion in the Cambridge Econometrics report published in 2003. As we indicate below, reconciliation work will be necessary.

2.7.2 Participation and attitudinal data and indicators

From the Cambridge Econometrics report we note that

- South West residents spend £1 billion annually on sports-related goods and services. This is about 2.5% of total household spending, lower than the national figure at 3%.

- Around 575,000 people participate in organised sports clubs.

- High profile sports events attract 920,000 people and £72 million into the region from elsewhere. This is a larger number of people than for any other English region.

- People in the South West spend more money each year actively participating in sport than attending or viewing sport in the media.

2.7.3 Gap analysis

In the sports sub-sector the key areas for more work are:

- Consolidation of a regional economic impact model.

- Work on the contribution of sport to social inclusion and community well-being.

- Research on participation by demographics (age, gender, ethnicity, disability, income group, etc) in sporting activities.

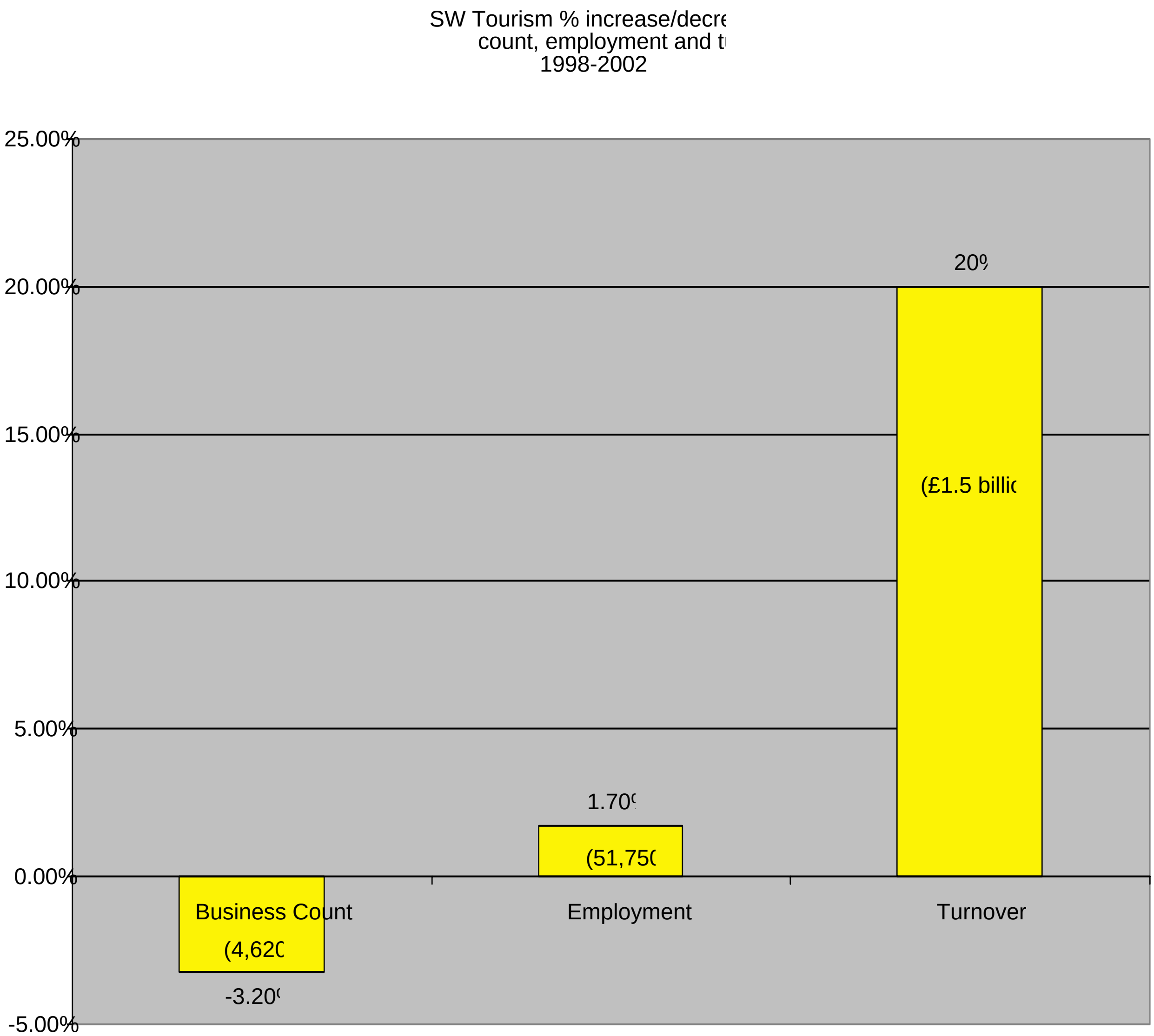
- More detailed analysis of spending patterns in sports and sports-related activities correlated with demographics.

- Reconciliation with the system of calculation for business count, employment and turnover in the RCDF.

2.8 TOURISM

The nature of the South West region means that tourism is a strategic sub-sector which communicates directly with a number of other contiguous sub-sectors within the RCDF – Visual Arts, Performance, Heritage and Sport. On the RCDF count (not the same as the industry self-definition) the sub-sector is growing steadily in both employment and turnover.

2.8.1 Tourism business growth, employment and turnover



Source: National Statistics, Interdepartmental Business Register (2003)

Again the RCDF-generated turnover figure of £1.5 billion is significantly less than standard industry estimates. As we indicate below, and as with the Sport sub-sector reconciliation work will be necessary.

2.8.2 Participation and attitudinal data and indicators

We note from the regional data[18] that:

- Nearly 20 million UK residents and 1.4 million overseas residents visited the South West in 2001. They spent nearly £3.8 billion.

- The South West has three of the top tourist attractions in the country in the Eden Project, the Roman Baths at Bath and Stonehenge.

- 2001 visitor figures include the following:

➢ Eden Project, Cornwall	1.7 million
➢ Roman Baths, Bath	865,000
➢ Stonehenge, Wiltshire	677,000
➢ The Arnolfini Gallery, Bristol	545,000
➢ Royal Albert Memorial Museum, Exeter	450,000
➢ Bristol Museum & Gallery	254,000

2.8.3 Gap analysis

Tourism is an 'amorphous' industry with a shifting field of definition of its core product. It is clear that in the South West, however, a key part of the core product is the distinctive range of cultural and leisure assets on offer. In this context there is important work to be done in the following areas:

- Reconciliation with the system of calculation for business count, employment and turnover in the RCDF.

- The development of a regional impact model for the tourism sub-sector which includes specific indicators on the role of other sub-sectors within the RCDF framework.

- Mapping and research to support a regional cultural tourism strategy. We note that initiatives began in this area from 1998 with the 'Cultural Routes of the South West' project, the Film and Television Tourism initiative promoting the

[18] South West Tourism (2003) *South West Visits to Attractions* (available for download from http://www.swtourism.co.uk/html/research_statistics.shtm)

South West as a location for filming, and the Watersports Tourism Strategy[19]. Because of agency re-organisation the momentum on these appears to have slowed or faltered and it urgently needs to be re-established in the context of a wider cultural tourism inititiative and strategy.

- Results from the *Penwith Cultural Tourism Report*, however, indicate some important trends including:

- 60%+ of visitors going to art galleries
- A total spend of £88 million in Penwith on entertainments, arts and crafts.
- 20% of visitors intending to visit outdoor theatre
- 97%+ of visitors stating that the natural landscape was a key factor in deciding to visit Penwith.
- 50% of UK and 59% of non-UK visitors indicating that arts and crafts were a key factor in deciding to visit Penwith.
- 31% of UK and 36% of non-UK visitors indicating that history and heritage were a key factor in deciding to visit Penwith.

Source: Kevin Brownridge and Victoria Howard (2003*) Penwith Cultural Tourism Report*, Penwith District Council[20]

On the basis of these figures in a relatively small, but very popular part of the region, it seems clear that there is a need for similar work at larger sub-regional and regional levels.

[19] See the SW Tourism Web site for information on these initiatives at, respectively http://www.swtourism.co.uk/html/cultural_routes_of_the_south_west.shtm, http://www.swtourism.co.uk/html/film_and_tv_tourism.shtm, and http://www.swtourism.co.uk/html/watersports_tourism.shtm.
[20] Penwith District Council covers the far West of Cornwall and includes Penzance, Newlyn, St Ives, St Just and Land's End.

2.9 SUMMARY

2.9.1 'Mapping the gaps' against the RCDF

If we return now to the RCDF Matrix and include 'dot' counts for data sets available for the seven sub-sectors we will get a clearer picture, at the quantitative level, of where more research needs to be undertaken. Each dot corresponds to one Standard Industrial Classification (SIC) data set available through the Annual Business Inquiry (ABI). This enables a count of 'statistically visible' employment in a particular code (e.g. 'artistic and literary creation' – code 92.31). It is clear from the table on the following page that in some sub-sectors, notably Visual Art and Performance, these dots are very thin on the ground. And even where there are SIC codes available this does not mean that we are able adequately to count the number of people or firms or their turnover. This is because the framework does not allow the inclusion of the majority of self-employed or non-VAT returning individuals or businesses (those with an annual turnover of less than £56,000). Nor are these SIC codes sufficiently sensitive at present to adequately differentiate, in many cases, between creative, technical and administrative workers in a given industry or to pick up, for example, emergent industry sub-sectors such as leisure software design (and many other more established categories of design). Fashion designers, for example, are subsumed within the general industry category of 'Textiles, Clothing and Footwear', industrial product designers are subsumed within their respective groupings of 'Manufacturing Industry' and craft workers are pretty much invisible.

Even on the basis of the SIC codes identified in the *Regional Cultural Data Framework*, then, the picture is far from complete as the table shows.

RCDF MATRIX DATA COUNT (NUMBER OF SIC CODES BY DOMAIN AND FUNCTION)

	CREATION	MAKING	DISSEMINATION	EXHIBITION & RECEPTION	ARCHIVING & PRESERVATION	EDUCATION & UNDERSTANDING
VISUAL ART	●●					
PERFORMANCE		●	●●●	●●		
AUDIO-VISUAL	●●●	●●●●●●● ●●●	●●●●●	●	●●	
BOOKS AND PRESS	●	●●●●●●● ●	●		●●	
HERITAGE		●●●●●●● ●●●●●●● ●●●●●●●	●	●●	●	
SPORT		●●●	●●●	●●●●		
TOURISM	●	●●●●●●● ●●●●●	●	●●		

On the ‘vertical axis’ of the sub-sectors or ‘domains’ it should be clear where the strategic weaknesses and gaps in the quantitative knowledge base are: the fewer the dots, the less we know. On the ‘horizontal axis’ of the ‘functions’ or the stages of the value chain, it is clear that, again on a purely quantitative basis, knowledge begins to weaken at stage 4 – Exhibition and Reception and disappears at stage 6 – Education and Understanding. For visual arts and crafts in particular this will lead to significant under-counts in business numbers, employment and turnover as it excludes people working in galleries and other retail outlets for artistic product. There are also qualitative issues associated with our lack of knowledge of the consumption end of the value chain. It is not possible to assess who is ‘consuming’ cultural product and, more importantly *who is not*. For reasons *simultaneously* of market and audience development *and* of social inclusion, this sort of knowledge of the reasons for usage/non-usage correlated with socio-economic, gender, ethnic and other demographic criteria will become crucial both for the sustainability of the sector and the elaboration of appropriate policy settings and mechanisms of assistance to targeted areas.

In terms of the availability of SIC codes, however, it is clear that there will be little data of a more complex and sensitive type until the planned national revision of the SIC codes in 2007. It is likely that data sets will not be available until well after the codes are revised and new data collection mechanisms are established.

In the meantime we have to work with what is available from the national data sets and supplement and enhance them at the regional and sub-regional level.

2.9.2 Cross-cutting and joining up: a strategic and integrated research agenda for the SW cultural sector

Prior to the 2007 SIC Code revision there are a number of things that can be done which draw on the region’s research capacity and in which a regional lead or ‘steer’ is necessary.

2.9.2.1 Supplement national data sets with local intelligence

In a number of local or sub-regional projects around the region, available data sets have been used as a minimal baseline and then supplemented with local knowledge. The Cornish *Creative Value* report (2003), for example, uses the SIC codes as a basis for measuring the economic impact of the Visual Arts, Performing Arts and Audio-Visual sub-sectors in terms of employment, business count and turnover but supplemented these by tracking the statistically invisible self-employed and sole traders by using local freelancers who work in these sub-sectors. These are people who are familiar with and well networked in their respective sub-sectors and are able to undertake the necessary ‘detective work’ to identify the large number of people (up to 60% of the workforce in this case) who are not counted in the national data sets. The cultural sector and, especially, sub-sectors tend to be well networked in both formal and informal arrangements at local and sub-regional level and this is an effective mechanism for building the knowledge base.

2.9.2.2 Collect and co-ordinate data available from cultural strategy consultations, Best Value Reviews, Comprehensive Performance Assessment and other processes.

There is a good deal of data and other information embedded in the documentation necessary for the preparation of cultural strategies (now complete) and for community strategies, where local government should be encouraged to develop a systematic approach to the collection of cultural data. The same applies to Best Value Reviews and Comprehensive Performance Assessments (CPAs) of cultural and leisure services where hard data is normally a requirement but where, also, cultural indicators are in short supply. Working with local government, it would be desirable for Culture South West to develop a template for the collection of cultural data to inform these review processes on an ongoing basis and to establish a 'clearing house' for this data to be accessed at regional level. The documentation collected for this report provides a starting point and the RCDF provides a framework for organising and managing this data.

2.9.2.3 Begin the work of developing cultural indicators for the revised Regional Cultural Strategy in the context of the Integrated Regional Strategy.

Data collection can be an arid exercise in itself and becomes more interesting when it begins to point in particular directions. The process of data collection should be informed by the need to transform data into information and agreed indicators for development at regional and sub-regional levels. The framework provided by the RCDF provides a timely mechanism, in the context of the development of the *Integrated Regional Strategy* for the South West, to use the available data as a basis for developing a suite of indicators to inform, guide and measure the progress of objectives set out in regional strategies.

A good recent example of this sort of work at regional level is the *Time for Measuring Culture* report (2003) for Culture East Midlands (the Regional Cultural Consortium) where 5 key indicators (supported by 130 additional measures) are proposed as follows:

- Indicator 1: Level of cultural participation
- Indicator 2: Level of Employment in the Cultural Industries
- Indicator 3: Extent of Protection of Cultural Environment
- Indicator 4: Level of funding and investment in cultural activities
- Indicator 5: Representation of culture within local strategic partnership activity

These five indicators provide an agreed template for performance assessment and research at sub regional and regional levels.

2.9.2.4 Identify key catalysts and initiatives

In those areas where data is either thin or non-existent in the RCDF Matrix above it would make sense to identify some key catalysts and initiatives on cross-cutting and/or intersectoral themes to encourage the development of the knowledge base. These might include:

- A *social inclusion* research initiative to understand the patterns and trends of cultural *consumption* by demographic, with particular attention to marginalised and excluded groups. A focus might be on issues of intellectual and cultural access to cultural activities and an evaluation of the extent to which enhanced cultural participation might lead to social and human capital development.

- A *cultural tourism* research initiative which would involve a comprehensive mapping of the region's cultural assets and resource base and their actual or potential role in a sustainable cultural tourism strategy.

- A *cultural education and training* research initiative which would include a full 'industry' mapping of people involved in imparting skills and competencies to the cultural sector. This would cover both the 'creation/production' end of the value chain (training of professionals who work in the sector) and the 'consumption/understanding' end of the chain (people working in analytical, interpretative and 'studies' fields – cultural studies, cultural management, film and media studies, sport studies, literary studies, heritage studies, tourism studies, etc.)

3.0 JOINING THE DOTS

We are moving towards a position where we can begin to sketch the lines, contours and tones of the map or bigger picture to enable us to join the dots more effectively.

In this section we concentrate on the operational necessities for joining the dots.

3.1 BUILDING AND JOINING THE KNOWLEDGE AND EVIDENCE BASE

3.1.1 Building the *quantitative* baseline through the template of the RCDF at a regional and sub-regional level.

The RCDF provides, as we have noted, a useful *minimum* template for developing the quantitative baseline for cultural sector research in the region. It is subject to amendment and modification and there are many areas where, from an industry point of view, there appear to be significant undercounts of business numbers, employment and turnover especially in sport and tourism. These numbers notwithstanding, however, the RCDF provides a basis for ensuring that, at least we are counting with the same number system and in the same currency.

But the RCDF needs to be regionally supplemented with the sort of counting that regional agencies tend to do (or should do) best. This would include (actual or potential sources are identified where appropriate):

Participation data such as:

- Library visits per capita (already Best Value Performance Indicator (BVPI) 117)
- Visits to/use of museums per 1000 population (Best Value Performance Indicator (BVPI) 170a)[21]
- Number of readers in archives per 1000 population (Chartered Institute of Public Finance and Accountancy [CIPFA] Leisure and Recreation Statistics)[22]
- Participation in sports, games and physical activities (Regional Quality of Life Counts indicator J4)
- Leisure day visits (Quality of Life Counts Indicator D17)

[21] Best Value Performance Indicators available on the web site of the Audit Commission at http://www.bvpps.audit-commission.gov.uk/ . National and regional Quality of Life counts are available at http://www.sustainable-development.gov.uk/sustainable/quality99/, and http://www.sustainable-development.gov.uk/indicators/regional/.
[22] http://www.cipfa.org.uk/. Data available by subscription.

- Tourism visitation figures for the region as a whole and key cultural attractions (South West Tourism)

- Attendances at professional arts performances and events per 1000 population (partly from Arts Council England/Target Group Index, partly from local government)

- National Trust and English Heritage membership per 1000 population (National Trust and English Heritage)

- Data on demographics (gender, ethnicity, socio-economic status where available)

Industry data such as:

- Employment, business count and turnover in the cultural/creative industries (National Statistics – *Interdepartmental Business Register*(IDBR), *Annual Business Inquiry* (ABI), *Labour Force Survey* (LFS)

- Comparative industry growth and decline trends (Business and Economy Module, South West Observatory)

- Industry skill and training needs (regional cultural and other agencies and Skills Learning and Intelligence Module (SLIM), South West Observatory)

- Inward investment (Business and Economy Module, South West Observatory, SWRDA, Government Office for the South West (GOSW))

Existence of instruments, measures such as:

- Existence of a cultural strategy (Best Value Performance Indicator [BVPI] 114)
- Listed buildings per hectare
- Listed buildings at risk
- Conservation areas, Areas of Outstanding Natural Beauty (AONB) and Sites of Special Scientific Interest (SSSI)
- Number and usage of sites and monuments
- Parks and open spaces with Green Flag awards

Levels of investment and funding for:

- Tourism, Open Spaces, Culture and Heritage, Recreation and Sport (BVPI 116)
- Lottery awards (available from the various Lottery Fund distributors)

- EU Structural funds (normally available from the Government Office for the Region)

Profile of the cultural sector in forms such as:

- Mentions, features in local, regional, national press, television, radio (in-house or press cuttings service)
- National and international awards and other recognition

Most importantly this ‘counting’ needs to be done at a co-ordinated regional level, preferably in partnership with the South West Observatory and overseen by Culture South West.

In this process of counting – resource intensive but relatively straightforward – it can be seen that connections can be made with areas such as quality of life (Local, Regional and National Quality of Life Counts and stakeholder/user satisfaction levels (Best Value and CPA) This can open the door between quantitative data and politically determined qualitative and policy areas. That is to say, the process is already in train for the transition from ‘data’ to ‘indicators’.

3.1.2 Building the *qualitative* baseline through ‘cultural mapping’ and ‘cultural capital assessment’.

The quantitative baseline outlined above, and building on the RCDF, provides the foundations for a more elaborate structure which now needs to be furnished with more elaborate features in the form of robust qualitative data which, crucially, *can be represented in quantitative forms*.

This will involve a concerted regional initiative for the mapping of the region’s cultural assets and resources: its cultural capital.

‘Mapping’ in this context should not simply be a utilitarian inventory of assets – places, events, etc. It should also constitute more qualitative assessment of the *uses* of cultural resources in relation to areas and issues such as personal development, identity, sense of place and community, cohesion and the recognition of diversity.

This is about:

- Assessing the relationship between access to cultural resources and the development of personal and social competencies.

- The use and consumption of cultural resources in the construction of personal, social, gender, ethnic and community identities.

- The use and consumption of cultural resources in the construction of lifestyle.

While certainly more complex to assess, the point is that these are measurable and reportable.

As an example of this sort of work the *DCMS Research Strategy to 2005-06* [23] cites the Organisation for Economic Co-operation and Development (OECD) *Programme for International Student Assessment* (PISA) which reported *quantitatively* on qualitative issues relating to literacy.

This study found that:

- *Classical cultural possessions* (classical literature, books of poetry, works of art) in the family home are closely related to literacy levels. This possession index explains 8.2% of the variation in combined reading literacy across the OECD whereas family wealth explains only 2.6% of the variation. Across the OECD, reading performance increases significantly for each unit increase in the possession index.

- *Participation in cultural activities* (how often a museum or art gallery visited, an opera, ballet or classical music concert attended or live theatre watched) explains 5.7% of the variation in reading performance across the OECD with a rise of 18 literacy points for each unit increase in the participation index.

- *Frequency of cultural communication* (parental interest and the frequency with which parents engaged in discussing political or social issues, discussing books, films or television programmes, and listening to classical music) explains 5.8% of the variation in student literacy performance across the OECD. For the UK a unit increase in the communication index produces 28 additional literacy points.

What this example of 'cultural capital assessment' suggests is that there is a direct and measurable connection between forms of cultural participation and levels of competency, capacity, esteem and, of course, employability in the same way that there are direct and measurable connections between levels of sports and physical activity and health.

There is an urgent need, in this context, to extend research on cultural 'impacts' beyond the economic field and into the broader social and cultural environment in order to provide an evidence base for - and make the connections with - wider and more strategic policy agendas.

This is an area in which strategic partnership with the Higher Education sector at regional and national levels will be important in order to leverage partnership research and funding opportunities in areas such as cultural consumption, cultural

[23] Circulated for comment by the DCMS in 2002 and available on their web site at www.culture.gov.uk.

and social capital assessment. The Economic and Social Research Council (ESRC) will be an important source of funding in this area through its research programmes and centres so will the Arts and Humanities Research Board (-AHRB - soon to be a Council) which has, as yet, funded little cultural sector policy research. A joint strategic plan with the Higher Education Regional Development Association South West (HERDA-SW) will be a necessity.

We note, in this context, the comments of the expert panel responsible for assessing research in universities in the field of Communication, Cultural and Media Studies for the last Research Assessment Exercise (RAE) in 2001:

> "The panel also noted the small quantity of policy-oriented research. Independent work in this field for government or other major clients requires significant resources and it was noted that very little work of this kind had been conducted, meaning that there was therefore scant academic engagement in contemporary policy debates, either internationally or nationally. The panel considered this to have serious consequences, as much policy work is now carried out either in-house in government and media or by think-tanks and market research or other commercial organisations - whose staff are often drawn from graduates or researchers in the field. The crowding-out of academic research has become seriously detrimental to the quality of public debate. Only universities are able to undertake policy research that is independent of the source of funding. …. Although this may not appeal to the short-term demands of commercial organisations, it should receive more serious consideration by governments and public bodies interested in genuinely independent inputs into 'evidence-based policy'. [24]

Given that the RAE determines the level of research funding for universities there is a clear incentive here for regional universities to develop new research directions in, for and with the cultural sector in the South West.

In addition to these sources of funding for core and 'pure' research at regional level, there are also important sources of 'Third Stream' funding for applied research and development geared to employment and skills development in the field such as the HEFCE funding of, for example, research activities of the Centre for Creative Enterprise and Participation (CCEP) at Dartington College of Arts in Devon

[24] Report on Unit of Assessment 65: Communication, Cultural and Media Studies. See the RAE web site at http://www.hero.ac.uk/rae/overview/.

3.1.3 Making the connections between culture, quality of life, regional profile/image, inward investment and regeneration/development

The cultural sector used to have to resort to ‘special pleading’ of the ‘economic impact through multipliers’ type. This is no longer the case. Other connections – with economic development in a knowledge economy, with individual and professional competency development, with quality of life and the capacity to attract inward investment and skilled workers – are becoming both apparent and demonstrable.

The key point here is that these connections are not demonstrable by quantitative data alone as we indicate now.

3.1.3.1 Culture and quality of life

The connection between culture and quality of life needs to be demonstrated through essentially qualitative and attitudinal factors such as:

- The relationship between cultural participation, individual development and life chances.
- The relationship between cultural participation and activities and the perceptions and realities of community safety.
- The relationship between availability of cultural resources and facilities and the decision to move to or stay in an area.

3.1.3.2 Culture and regional profile/image

For both the residents of a region and its visitors, the connection between a region’s cultural assets and its overall profile and image needs to be demonstrated through measures such as:

- Attitudinal surveys of residents, visitors, business relocators.
- Attitudinal surveys of what it is about the region’s cultural profile that attracts – or repels – different demographic groups.

3.1.3.3 Culture and inward investment

It is often stated that the region’s cultural assets are an important factor in attracting and retaining inward investment. This is probably true, but it needs to be demonstrated through:

- Attitudinal surveys of established, recently located and potential locating businesses and investors.

- Attitudinal surveys of business employees.

3.1.3.4 Culture and regeneration

The connection between culture and regeneration is now fairly well established but the case has to be constantly reinforced through measures such as:

- Stakeholder surveys (businesses, cultural sector, planners, developers)

- Job and business retention surveys (employees and employers)

It is in marrying the quantitative baseline to the qualitative baseline in this way that the arguments can best be made and the evidence base consolidated.

3.2 FROM DATA TO INDICATORS TO BENCHMARKS TO POLICY

Pathways for research-informed translation from data to indicators to benchmarks to policy are already open and they include the following.

3.2.1 Linking local, regional and national agendas

There is, as we have noted, a paucity of sophisticated, policy-relevant, and evidence-based cultural indicators. Whether in the context of nationally published Best Value Performance Indicators or the criteria used for Comprehensive Performance Assessment or in Quality of Life Counts, culture is largely defined by its absence. But these are also the mechanisms which provide an opportunity – especially a regional lead opportunity – for getting culture onto mainstream policy agendas. These are all indicators which have to be informed by appropriate research methods and mechanisms which enable connections to be made – and a common currency established – at local, regional and national levels.

Research has been a key factor in the development of the DCMS Creative Industries agenda, now spinning off significantly at local and regional levels and, in its *Research Strategy to 2005-06*, the DCMS is clearly moving towards the development of coherent and evidence-based research to inform policy. This includes a proposal for the establishment of a dedicated university-based DCMS Research Centre on a competitive bidding basis to become operational in 2004-06. One or more universities in the South West region may well be in a position to bid for this and this is an initiative on which CSW should keep a watching brief.

3.2.2 Mechanisms and incentives for partnership with the HE sector

Many academic disciplines – economic, social theory, management studies, sociology – have taken a distinctive ‘cultural turn’ in their attention to issues relevant to a knowledge economy which were previously the preserve of cultural and communications studies. These latter disciplines are also growing rapidly and the creative industries agenda is becoming more visible in university curricula and research programmes. Universities are themselves experiencing something of a ‘regional turn’ with the development of Higher Education Regional Development Associations (HERDAs) and the increasing positioning of many universities, especially the newer universities, as regional centres of excellence in teaching and research.

Cultural industry and cultural policy research is a relative newcomer to the field but is increasingly being funded through the programmes and centres of the Economic and Social Research Council (ESRC) and will be an important component of the Arts and Humanities Research Council when it makes the transition from being a Board. As we noted above, the last round of the important Research Assessment Exercise (which provides funding for university research based on scores), strongly recommended the development of a cultural policy research agenda in the Communication, Cultural and Media Studies area. The Higher Education Funding Council for England (HEFCE) is also funding cultural industry related research, some of which is taking place in South West HE institutions.

This agenda is growing strongly and it will be important for Culture South West to liaise with HERDA-SW and individual institutions to develop and consolidate the momentum for both teaching and research purposes.

4.0 BUILDING UP FROM THE 'FLOORPLAN' OF THE RCDF

As we signalled earlier in this report (Section 1.1.2.5) a modification to the structure for data collection in the *Regional Cultural Data Framework* (RCDF) from a six stage to a five stage model is proposed here. The rationale for this is as follows.

In this model:

- The RCDF Function 5 ('Archiving/Preservation') is included within 'Dissemination and Circulation' on the basis that one archives and preserves essentially in order to make available.

- The RCDF Function 4 ('Exhibition and Reception') is divided between 'Dissemination and Circulation' and 'Consumption'.

- The RCDF Function 6 ('Education/Understanding') is relocated to the 'Creation' stage at the beginning of the production chain. In our view Education/Understanding are essentially 'inputs' to the culture cycle and preconditions for cultural creativity in the first place. Education and training inputs in arts marketing, heritage studies, sports development, heritage tourism, etc., can also be distributed along the production chain in their appropriate location.

These changes should also assist the Heritage, Sport and Tourism sub-sectors to:

- better position themselves within the value chain in so far as 'Creation' can be taken to be about the 'generation of content' (a heritage site or its representations, a sporting capacity which can be trained and formed, a place which can become a destination).

- avoid the problems of locating (and 'pigeon-holing') their activities in functions such as 'Archiving and Preservation'.

- More easily locate the research, marketing and promotional dimensions of their respective industry.

In the following pages a revised matrix incorporating the 'floorplan' of the RCDF is presented but also incorporating qualitative research alongside the quantitative research where necessary and appropriate.

The matrix can be applied to the cultural sector as a whole or to each individual sub sector on a piecemeal or cumulative basis.

The proposed modifications to the RCDF are as follows:

Stage 1: Creation: comprising

Statistical data from SIC and SOC codes and other sources for those professionally involved (employed or otherwise) in cultural creation, broken down, as necessary, by sub-sector.

- Statistical and other data relating to training, funding and investment in cultural creation.

  - Information on the existence of policy frameworks and strategies to encourage/facilitate cultural creation.

Stage 2: Production and reproduction: comprising

- Statistical data from the Annual Business Inquiry (ABI) etc., on production turnover in the cultural sector.
- Statistical and qualitative data on availability of infrastructure for cultural production (facilities, infrastructure audits, etc.)
- Statistical and other data on reproduction of original product.
- Information on the existence of policy settings and strategies to address infrastructure and other production support needs.

Stage 3: Promotion and Knowledge: comprising

- Statistical and other data on marketing support, eg. marketing spend as % of total spend.
- Statistical and qualitative data on research capacity and outputs.
- Statistical and other data on 'export' capacity (national as well as international).
- Information on the existence of policy settings, frameworks, and strategies to address marketing, research and promotional needs.

Stage 4: Dissemination and Circulation: comprising

- Statistical and other data on audience reach and diversity for produced cultural forms.
- Statistical and other data on number of institutions and agencies for distribution of cultural product.
- Statistical and other data on use of Information and Communications Technologies (ICTs) and Broadband as a means of dissemination.
- Information on the existence of policy settings and strategies to address dissemination and circulation needs.

Stage 5: Consumption and Usage, comprising;

- Statistical and qualitative data on diversity of cultural forms consumed and modes of consumption and usage.
- Statistical and other data on expenditures on cultural products per capita/family and by demographics.
- Statistical and other data on proportions of domestic and international consumption of cultural product.
- Information on the existence of policy settings and strategies to address consumption and usage issues

In tabular/matrix form this model is set out on the following page

CREATION	PRODUCTION AND REPRODUCTION	PROMOTION AND KNOWLEDGE	DISSEMINATION AND CIRCULATION	CONSUMPTION AND USAGE
• Statistical data from SIC and SOC codes and other sources for those professionally involved (employed or otherwise) in cultural creation broken down, as necessary, by sub-sector.	• Statistical data on production turnover in the cultural sector	• Statistical and other data on marketing support, e.g. marketing spend as % of total spend.	• Statistical and other data on audience reach and diversity for produced cultural forms.	• Statistical and qualitative data on diversity of cultural forms consumed and modes of consumption and usage.
• Data, statistical and other relating to training, funding and investment in cultural creation.	• Statistical and qualitative data on availability of infrastructure for cultural production (facilities, infrastructure audits, etc.)	• Statistical and qualitative data on research capacity and outputs.	• Statistical and other data on number of institutions and agencies for distribution of cultural product.	• Statistical and other data on expenditures on cultural products per capita/family and by demographics.
• Information on the existence of policy frameworks and strategies to encourage/facilitate cultural creation	• Statistical and other data on reproduction of original product	• Statistical and other data on ‘export’ capacity (national as well as international)	• Statistical and other data on use of ICTs and Broadband as a means of dissemination.	• Statistical and other data on proportions of domestic and international consumption of cultural product.
	• Information on the existence of policy settings and strategies to address infrastructure and other production support needs.	• Information on the existence of policy settings and strategies to address marketing, research and promotional needs	• Information on the existence of policy settings and strategies to address dissemination and circulation needs.	• Information on the existence of policy settings and strategies to address consumption and usage issues

5.0 KNOWLEDGE MANAGEMENT FOR THE CULTURAL SECTOR: RECOMMENDATIONS

5.1 A MORE FLEXIBLE TEMPLATE FOR KNOWLEDGE MANAGEMENT

This matrix provides a baseline template for both quantitative and qualitative data and information collection and management – knowledge management – for the South West cultural sector. It incorporates the RCDF while providing a slightly more open conceptual architecture in which information from widely varying sub-sectors can be accommodated without too much of a squeeze to fit.

It can also be built on to provide more sophisticated levels of research and knowledge to inform policy settings for the sector. It is sufficiently generic to enable it to be applied to each sub-sector in turn without the problem – a weakness in the RCDF – of imposing a false unity of functions on the different sub-sectors.

It can also address the issue, raised by many, of the slightly odd positioning of, for example, Architecture, within 'Visual Arts' or Advertising and Music within 'Audio-Visual'. It would enable those industries to be addressed separately as necessary and appropriate.

Guided by this template and the RCDF the following actions are recommended.

5.2 RECOMMENDATIONS

5.2.1 Key Recommendation 1: enhancing the quantitative baseline

The *quantitative* baseline for cultural statistics and data for the South West cultural sector should be significantly enhanced by:

- Baseline statistical mapping of Standard Industrial Classification (SIC) and Standard Occupational Classification (SOC) codes and other sources as suggested by this report and building on the recommendations and directions of the *Regional Cultural Data Framework* (RCDF).

- Establishment of a research coordination and clearing house function overseen and managed by Culture South West linked with the South West Observatory.

- Collation of existing data from sub-regional and local levels.

- Encouragement of local, area and sub-regional cultural sector mapping.

- Addressing the 'gaps' identified by this report in regional research outputs in the areas of marketing, promotion, dissemination and distribution.

5.2.2 Key Recommendation 2: enhancing the qualitative baseline

The *qualitative* baseline for research in the South West cultural sector should be greatly enhanced by

- Support for region-wide and sub-sector specific mapping relating to attitudinal factors in the cultural sector.

- Collaboration with universities and other regional and national research-competent institutions on the relationship between cultural, social, human and economic capital at regional level.

- Encouraging and facilitating research on the relationship between culture, identity, image and sense of place.

5.2.3 Key Recommendation 3: sub-sectoral priorities

This report has identified sub-sectors where the paucity of both quantitative and qualitative data is a serious hindrance to policy formation, planning, and development. This situation should be addressed by supporting and facilitating:

- Region-wide research into the Visual Arts and Performance sub-sectors as identified in the RCDF. For the Visual Arts sub-sector, in particular, there is an urgent need to investigate the distribution and retail end of the sector's activities in the form of galleries, dealers and the wider arts and antiques market. Within the Performance sub-sector there is also an urgent need to investigate the extent and nature of the music industry, both performed and recorded, in the region.

- Region-wide research into the size, extent and impact of the craft, design, creative new media (including games and interactive leisure software)

- A region-wide study of the extent and economic impact of the historic environment sector building on work already completed or underway in the region including Stonehenge, the *Cornish Mining World Heritage Site* bid and public realm infrastructure ('public product') in Cornwall A region-wide impact study for the tourism sub-sector focussed especially on the relationship between tourism and the region's cultural assets

- A region-wide research agenda, with South West Tourism, English Heritage, South West Museums Libraries and Archives Council

(SWMLAC) and other agencies, on the conditions for a sustainable cultural tourism initiative.

- A region-wide research initiative with Sport England (South West) on the social benefits of sports participation to complement the work already undertaken on the economic impact of sport.

5.2.4 Key Recommendation 4: cultural data and quality of life indicators

This report has identified the need to enable and facilitate translation from data to information to knowledge and policy in the context of both 'joined-up government' and addressing urgent cross-cutting policy issues such as cultural diversity, social exclusion, and regeneration. In this context Culture South West, in partnership with other regional and sub-regional agencies should:

- Initiate and oversee, with appropriate partner agencies, research into appropriate cultural indicators which links them to Quality of Life Counts, Best Value Performance Indicators and the Comprehensive Performance Assessment (CPA) process. A sub-regional model for this exists in the form of Bristol City Council's Quality of Life Index.

5.2.5 Key Recommendation 5: incentives and mechanisms for applied cultural sector research.

This report has identified significant research capacity in the region that is in need of co-ordination and leadership. In partnership with the Higher Education Regional Development Association South West (HERDA-SW), South West Regional Development Agency (SWRDA) and regional universities, Culture South West should:

- Facilitate and/or establish a regional cultural research initiative with Higher Education representation to address the field of grant funded research supported by the Economic and Social Research Council (ESRC), the Arts and Humanities Research Board (AHRB), The Higher Education Funding Council for England (HEFCE) and other relevant funding sources.

- Enter discussions with the Higher Education Regional Development Association South West (HERDA-SW) on the possibility of bidding to host the proposed DCMS Research Centre.

- Ensure active and research-competent liaison between Culture South West (CSW) and the Higher Education Regional Development Association-South West (HERDA-SW) Creative Industries Group and individual universities, departments and research centres with track records and potential in cultural sector research.