



## **AGENDA SUPPLEMENT**

### **Economy & Place Policy Development Committee**

**To:** Councillors Cuthbertson (Chair), Kramm (Vice-Chair),  
Cullwick, Dew, Looker, D Myers and Richardson

**Date:** Wednesday, 22 November 2017

**Time:** 5.30 pm

**Venue:** The Thornton Room - Ground Floor, West Offices (G039)

The Agenda for the above meeting was published on 14 November 2017. The attached additional documents are now available for the following agenda item:

2. **Minutes** (Pages 1 - 4)  
To approve and sign the minutes of the last meeting of the Economic & Place Development Committee held on 27 September 2017.
5. **'Impact of Arts & Culture on the Economy'** (Pages 5 - 78)  
**Scrutiny Review Draft Final Report**  
This report presents the findings from the scrutiny review of the 'Impact of the Arts and Culture Sectors to the Economy of York', together with the Task Group's review conclusions and draft recommendations, for the Committee's consideration.

This agenda supplement was published on Friday 17 November 2017.



## City of York Council

## Committee Minutes

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Meeting	Economy & Place Policy Development Committee
Date	27 September 2017
Present	Councillors Cuthbertson (Chair), Kramm (Vice-Chair), Cullwick, Dew, Looker, Richardson and Pavlovic (as a Substitute for Cllr D My)
Apologies	Councillor D Myers

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**13. Declarations of Interest**

Members were asked to declare any personal interests not included on the Register of Interests or any prejudicial or disclosable pecuniary interests that they might have in respect of the business on the agenda.

Councillor Pavlovic declared a personal non prejudicial interest in agenda item 6 (Impact of Arts and Culture on York Economy Scrutiny Review – Draft Final Report) as he undertook paid work for the housing charity Restore.

Councillor Cullwick declared a personal non prejudicial interest in the same item as, although he was not a trustee of the charity, he also worked closely with Restore.

Cllr Cuthberston declared a personal non prejudicial interest in the same item as a trustee of York Museums Trust. He advised that he had not taken part in the work of the Task Group on this review.

**14. Minutes**

Resolved: That the minutes of the meeting held on 26 July 2017 be approved as a correct record and then signed by the Chair.

**15. Public Participation**

It was reported that there had been no registrations to speak at the meeting under the Council's Public Participation Scheme.

**16. Priorities & Challenges for 2017/18**

The Executive Member for Transport and Planning had been scheduled to attend the meeting to present an update on the priorities and challenges within his portfolio area for 2017-18 however he was unable to attend due to unforeseen circumstances.

Resolved: That the Executive Member update be deferred to a future meeting of the committee.

Reason: In order that scrutiny members have the opportunity to receive an update and to question the Executive Member thereon.

**17. Presentation on the Medium Term Future of Urban Transport**

Members received a presentation from the council's Transport Systems Manager on the medium term future of urban transport. A briefing note had been included in the agenda papers for members information.

The presentation provided an overview of the technologies emerging in transport and the effect that they and the wider changes in society would likely have on local transport use and provision. This included the role of the council as operator of the city's transport network and the challenges posed in terms of how to develop and plan the road network and how to manage the development of the city centre more generally.

The Transport Systems Manager provided further information in response to questions asked by Members and specifically in relation to what these changes would mean in York.

Resolved: That the presentation and briefing note be noted.

Reason: In order that Members are kept updated on the potential for urban transport developments.

**18. Impact of Arts & Culture on York Economy Scrutiny Review  
- Draft Final Report**

Members were presented with the draft final report of the Arts and Culture Scrutiny Review Task Group on the Impact of the Arts and Culture Sectors on the York Economy Scrutiny Review. The report included all the information gathered by the task group together with the task group's conclusions and draft recommendations.

The Chair advised Members that since the agenda had been published, a significant government review on creative industries in the UK had been released, covering the whole range of creative industries and associated industries e.g. those involved in the display, marketing and dissemination of culture. Having spoken to the task group chair, he expressed the view that this report had considerable significance for the work of the task group.

The Assistant Director advised that the government review's key propositions around creative clusters and creative leaders offered a distinctive way forward and that it would be wise for York to consider what could be learnt and how it might position itself going forward. He expressed the view that the review scoped out the nature of the sector in a particularly clear way which York might want to respond to and consider how York's sector mapped onto the way described in the report.

The Chair of the Task Group agreed that the task group should meet with the Scrutiny Officer to look at strengthening the draft final report in light of the newly published review. Another task group member suggested that the recommendations be made more specific, so that the report could be used to form the basis of any future application for funding available to recognised creative clusters.

**Resolved:** That consideration of the draft final report be deferred to a future meeting in order that it could be looked at again in light of the newly published government review.

**Reason:** To conclude the review in line with scrutiny procedures and protocols

## **19. Work Plan 2017/18**

The Committee considered the work plan for the 2017/18 municipal year.

The Chair advised that the Executive Member for Transport and Planning would be invited to attend the next meeting on 22 November meeting to present his update and that the committee would also receive either the draft final report, or progress report, on the Impact of the Arts and Culture Sectors on the Economy of York Scrutiny Review at this meeting too.

Committee Members were asked to confirm their availability to attend an informal workshop on the strategic management of the council's commercial portfolio and the development of the council's Asset Management Strategy at 5.30pm on 8<sup>th</sup> November. As the majority of Members present confirmed they could attend this session, this date was confirmed and it was agreed that a separate briefing would be arranged for those members not available on this date.

The Chair advised that the committee had 4-5 policy areas to look at including asset management, the topic for the informal workshop, and the Transport Fleet Review. The scrutiny officer advised that following the workshop, there would be a piece of work in relation to the Asset Management Strategy and suggested, after the workshop, a task group be set up to focus on that piece of work.

One Member suggested that the Draft Animal Welfare Licensing Policy, on which consultation was due to end soon, may be something that the committee would benefit from looking at. It was agreed that the scrutiny officer would liaise with officers to determine whether this would fall within the remit of the policy development or the scrutiny committee.

**Resolved:** That the draft work plan for 2017-18, including the above amendments, be approved.

**Reason:** To ensure that the Committee has an agreed programme of work in place.

Councillor Cuthbertson , Chair  
[The meeting started at 5.30 pm and finished at 7.25 pm].



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**Economy & Place Policy Development Committee    22 November 2017**  
**Report of the Arts and Culture Scrutiny Review Task Group**

**Impact of the Arts and Culture Sectors on the Economy of York Scrutiny Review - Draft Final Report**

**Summary**

1. This report and its annexes present the findings from the scrutiny review of the 'Impact of the Arts and Culture Sectors on the Economy of York', incorporating feedback from the Scrutiny Review Task Group on their consideration of the Bazalgette Review. The report also presents the Task Group's review conclusions and draft recommendations, for this Committee's consideration.

**Background**

2. In late June 2016, as part of a discussion on potential topics for scrutiny review during the 2016/17 municipal year, the former Economic Development & Transport Policy & Scrutiny Committee expressed an interest in scrutinising the impact of the arts and culture sectors on York's economy, and asked whether such a review would add value to work already ongoing in the city.
3. After consideration of a feasibility report in July 2016, the Committee agreed to undertake the review, and appointed a Task Group comprising Cllrs Cullwick, Looker and K Myers to carry out the work on their behalf.
4. The Task Group met for the first time in August 2016. They appointed Cllr Looker as Chair and agreed the review should focus not on the quality and content of the city's cultural offer, but instead on the economic benefits it brought, particularly jobs. Recognising that York was keen to attract businesses to the city and that the city's cultural offer was a driver for job relocation, the Task Group also agreed that the attractiveness of the city was one of the things that encouraged people to relocate to York.
5. With the intention of maximising the benefits the city already had and developing the city's cultural sectors over the next decade, the Task

Group identified the following review remit, which was endorsed by the full Economic Development & Transport Policy & Scrutiny Committee at its meeting in early September 2016:

### Aim

To understand the value and impact of the arts and culture sectors on the economy of York and examine how they can further increase their impact on economic development and create additional high-value jobs in the city.

### Objectives

- i. To promote cultural amenities in the city for the purpose of attracting economic investment, leading to an increase in high-value jobs and the retention of high-quality employees.
  - ii. To examine the City Council's role within these sectors and assess what further interventions the Council can undertake to support these sectors.
  - iii. To identify ways to facilitate more and better joint working among cultural organisations.
6. The Task Group concluded its work on the review in May 2017, and a draft final report was presented to this Committee in September 2017.
  7. At the same meeting, Members were made aware of a recently concluded independent review of Creative Industries undertaken by Sir Peter Bazalgette, published in September 2017. The Committee recognised the need for the Council to consider the Bazalgette Review, and its connection to the findings of the scrutiny review. They therefore agreed to defer their consideration of the review draft final report to allow the Task Group time to consider the Bazalgette findings.
  8. In October 2017 the Task Group met with the Chair of York@Large to discuss the Bazalgette Report and to consider its recommendations in the context of York. The Task Group used the information to reflect on its review findings which has resulted in this revised draft final report.

### **Consultation**

9. To gather evidence in support of the original review remit the Task Group met representatives from numerous city organisations, including York@Large; Make It York; York Museums Trust; York Archaeological Trust; York Theatre Royal, City of York Council, the Arts Council, the



Guild of Media Arts, York Business Improvement District, Indie York; the National Centre for Early Music, Explore York Libraries and Archives, Borthwick Institute of Archives, York Minister, the National Railway Museum, the Yorkshire Air Museum and Welcome to Yorkshire.

10. In October 2017 they met again with the Chair of York@Large, specifically to discuss the findings from the Bazelgette Review

### **York's Cultural Sector**

11. For the purposes of this report, all references to the city's cultural sector and offer relate to the following three mutually beneficial sub-sectors:
  - Heritage  
Heritage is positioned as the main driver of tourism in York, but is over dependent on declining markets, with cultural tourism its biggest opportunity;
  - Arts  
York has an active and vocal arts community, including both individuals and organisations. This sub-sector is considered to be highly vulnerable to public funding cuts.
  - Creative Industries  
The Department of Culture, Media and Sports (DCMS) defines the creative industries sector as 'Those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property.' The city is strong in innovation and talent and has some star companies, but the sector is seen as fragile as York lacks support for growth in a company's early stages.

### **Information Gathered - Summary**

12. In support of the review objectives above, the Task Group considered information on the following – see Annex 1:
  - York's Local Plan, which now has a stronger cultural element;
  - Regional Information & Comparison Data provided by Historic England;
  - Culture White Paper published by the Department of Culture, Media and Sport in March 2016
  - Heritage Lottery Fund research

13. They also considered information on York's current Tourism Strategy & Economic Strategy, and research by the British Council around the value of cultural attractions. Finally, they gathered detailed feedback from the consultees listed above in paragraph 9 - see Annex 2.
14. York's Cultural Offer & its Relationship to the City's Economic Strategy  
One of the aims of York's Economic Strategy 2015-20 is to 'Make a Fresh Loud Statement of Cultural & Visual Identity'.
15. Information gathered in support of this review evidenced the intrinsic link between the city's economy and its cultural offer, and how that offer was affected by a number of the city's strengths, weaknesses, opportunities and threats identified within the Economic Strategy. For example, the challenges around developing office accommodation in the city centre. As the evidence for this review showed, many of our creative industry start-up businesses were struggling to find space to grow and develop, often resulting in them relocating elsewhere. Other issues identified within the economic strategy were also highlighted as part of this review e.g. graduate retention and how external perceptions about the image of the City were affecting its cultural offer.
16. York was placed 7<sup>th</sup> in Trip Advisor's Travellers' Choice top UK destinations in 2017. A significant number of the seven million visitors to the city every year are drawn here by its cultural offer. Spending by visitors is instigated in two ways. Some come to York primarily to visit cultural attractions, while others take part in cultural activities during trips that are made for other purposes, potentially extending trips and generating additional spending as a result.
17. York's rich history gives it a clear advantage, but the national tourism market grows increasingly competitive with towns and cities regionally and nationally investing heavily to attract the tourist pound.
18. Whilst York's heritage continues to be the centrepiece of its cultural offer, the diversity of its creative industries and its artists, businesses, entrepreneurs, festival organisers and retailers are also widely recognised. Furthermore, it is one of the best connected cities through its transport links and its ultrafast broadband network. The whole of the city's cultural offer is therefore of significant economic importance to York – as an employment sector, a driver of innovation and inward economic investment, and through its associated income generation (GVA<sup>1</sup>).

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<sup>1</sup> Gross Value Added (GVA) measures the contribution to the economy of each individual producer, industry or sector in the UK. It is used in the estimation of Gross Domestic Product (GDP). GDP is a key indicator of the state of the whole economy. In the UK, three theoretical approaches are used to estimate GDP: "production", "income" and "expenditure"

19. In addition to its fantastic history and heritage, York is the UK's only UNESCO City of Media Arts. Next year, a £1million international festival 'Mediale' will take place, bringing media art to life for people (for further information on Mediale see Annex 2, paragraphs 114-116). The Festival is seen as an important tool to showcase the city and encourage more inward investment based around York Central, the city's links to London, and its ultrafast broadband network, which as a combination makes York ideal for people working in the creative sectors who look to their environment for creativity.
20. The city's Guild of Media Arts was created to recognise and build on York's UNESCO status, to help develop an environment in which businesses and creative enterprises could flourish, using culture and creativity as drivers (for further information on the guild see Annex 2, paragraphs 13-18).
21. Creative industries represent York's fastest growing economic sector and add balance to its heritage assets and identity. Data collected by the Business Register and Employment Survey released in September 2016 showed that 4,500 are employed in the creative industries in York (based on the department of Culture, Media and Sports definition - see bullet point 3, paragraph 11 above).
22. The city's historic environment is also intrinsically linked to its economic activity, with a large number of those activities occurring within it, dependent on it or attracted to it. Thus, the economic value the cultural sectors bring to the city is increased by a variety of associated functions, e.g. the construction industry (maintenance of heritage buildings); conservation activity; investment in the investigation, research and display of archaeological sites and structures; education; other economic activity in historic buildings; and other businesses that benefit from spending by tourists, including shops, restaurants and hotels etc.
23. A Heritage Lottery Fund (HLF) study shows that historic buildings and the historic quarters of major towns and cities are the places where new ideas and new growth are most likely to happen. Research shows that the commercial businesses based in historic buildings in major cities are more productive and generate more wealth than is the average for all commercial businesses across the whole economy. For more information on the study findings, see Annex 1 paragraphs 30-32.

24. Not only does the range of economic activity associated with York's cultural offer help to make the city economically successful for its residents, it also brings a high quality of life. Culture and the arts drive pride in place and a sense of identity and belonging. They are good for social cohesion and mental health, reducing the impact on social care and health budgets. This high quality of life contributes to attracting new businesses to the city and is a factor in retaining employers and residents in the city.
25. While York has always been recognised as a leading centre economically, militarily and educationally, it has also consistently been a leading spiritual centre, as the home of the Archbishop and due to the wealth and vibrancy of its spiritual landscape. While the Minster is a jewel in the crown of York's tourism offer, the church and faith communities' strand of the city's history is also a significant part of York's story and form a large part of its cityscape (see Annex 2, paragraphs 89-101).
26. The Role of City of York Council (CYC)  
The Council has previously had a defined leisure and culture function with a dedicated team delivering those services, but this is no longer the case and its current role is that of a participant and collaborator, influencing and linking into the networks that are in place. The Council has a long history of establishing successful independent bodies to provide cultural services. These include York Museums Trust and more recently York Explore and Make It York.
27. The Council contributes both to Make It York (MIY) and Welcome to Yorkshire. It is also a member of a number of partnerships which have been created to enable joint initiatives and better collaboration both across the sector and with Council departments, including York Cultural Education Partnership, Culture & Wellbeing, an Arts & Place Group, and a Cultural Leaders Group.
28. The city's Cultural Leaders Group pulls together high-level creative and cultural leaders and managers from the larger organisations in York, including English Heritage, York Museums Trust, Aesthetica, Make It York, the National Trust, the National Railway Museum and the Guild of Media Arts.
29. The Independent Review of Creative Industries by Sir Peter Bazalgette, September 2017 (the 'Bazalgette Review')  
The review was commissioned from former Arts Council Chair Sir Peter Bazalgette by the Government's Business and Culture Secretaries and

was published in September 2017. The Report on the review was requested as part of the activity projected by the Industrial Strategy Green Paper and, as such, its recommendations could form part of ongoing Government policy, including 'Sector Deals' for specific areas of the economy. In preparing the Report its author worked closely with the Creative Industries Federation, a large membership based advocacy body, and the smaller industry-led Creative Industries Council.

30. It is important to note that the term 'Creative Industries' is used in the Report to apply to all nine sub-sectors defined in successive DCMS Mapping Documents, 'Advertising and marketing; Architecture; Crafts; Design; Film, TV and Radio; IT, Software and Computer services; Museums, Galleries and Libraries; Music, Performing and Visual Arts; Publishing'. This is identical to the 'culture sector' as we refer to it in York. The Report usefully describes how the sub-sectors reinforce one another through mutual interdependence, and have beneficial impacts that reach beyond 'its irrefutable economic contribution' to international soft power, to influence on other sectors, and to measures of wellbeing.
31. The Report argues that the current success of the sector in absolute and relative economic terms appears will continue, provided the framework for development is right. The core recommendation is that a £500m fund is used to support Creative Clusters as part of a Sector Deal, using the City Deal model currently employed in English regions. It refers to the existing Arts and Humanities Research Council (AHRC) Creative Clusters programme to invest £39m in industry-driven research and development activity. It notes that success depends on recognising that creative talent is widely distributed, and that understanding what factors drive successful clustering for the sector will enable more cities and regions to participate. The keynote of the discussion is the importance of the local authorities in these areas showing 'leadership, commitment and vision'.
32. The Report gives consideration to the protection of Intellectual Property, to the importance of digital infrastructure to enable clustering, of access to finance with appropriate sector expertise, and to the significance of the supply and nature of workspaces and studios.
33. A significant section is concerned with talent development, recognising that there are barriers to entry to the sector at all educational levels and that many groups may find their aspirations blocked. Two more specific sections relate to the screen-based industries and to reaching international markets.

34. The nineteen recommendations of the Report are for Government to consider. However, the thinking they embody, especially if the recommendations are taken up, is likely to shape the policies and attitudes of the national organisations with which York works. For instance the Report continues the policy direction of the Arts Council's current Chair, Sir Nicholas Serota, who in 2016 spoke of a 'fresh start' in the relationship with local authorities with a devolution deal, whether through a city-region or combined authority.
35. In a similar report 'The Geography of Creativity in the UK' published by NESTA in September 2016, 47 creative clusters were identified across the country based on 'travel to work areas'. York is not identified as one of the 47 creative clusters due to the way the data was collected. However it is named in the report as an example of another location where there is significant creative activity. The closest cluster to York was Leeds and Harrogate. Arguably York has as many preconditions for success as the places that are included. For example, an audit of current initiatives underway in York would include the University of York's Digital Creative Laboratories leading a Yorkshire-wide bid for the screen-based industries, which in turn is based on Screen Yorkshire's successful partnership planning with British Film Institute support; York Cultural Education Partnership's commitment to ensuring that every young person encounters and has the opportunity to be inspired by creative and media arts; and appropriate workspace is high on the agenda in discussion of York's Local Plan and redevelopment plans.

### **Issues Identified**

36. In gathering information specific to the review objectives, a number of recurring themes arose during the meetings with representatives of the various city organisations, as detailed below:
37. Objective (i) – Attracting Economic Investment  
Many consultees agreed that York's role in the wider Yorkshire offer needed greater clarity and promotion. They felt that more could be done to attract more world-class events, and to further establish York's identity in events held across Yorkshire in which the city could play an even greater part i.e. improving the city's profile beyond its borders.
38. Several organisations highlighted the need to attract and retain younger people to the city - evidence suggested the limited number of premises which offer space for start-up businesses to grow and develop was a

barrier to supporting and keeping starts ups in the city, and many younger people were leaving the city to pursue their careers. In order to fill the jobs the city is trying to create, and encourage more start-up business, the Task Group proposed that a better understanding about the reasons for the exodus was needed at city, civic and cultural leaders' level.

39. It was also suggested that while the city is strong in innovation and talent with some 'star' companies, there is a sense of fragility and some concern that York lacks support for growth in a company's early stages. Specifically in regard to the city's young, talented artists, evidence suggested many were leaving the city because there was nowhere for them to express their talents. It was therefore proposed that the city should improve its support for contemporary arts.
40. In recent years York has been described as a City of Festivals and some of those festivals are clearly useful both as attractions in their own right and as a tool for community engagement. Nevertheless many organisations felt that the idea of holding fewer but better quality festivals should be considered. Consultees pointed out those festivals which disappoint may devalue other festivals, damaging whatever brand identity has been created. They therefore suggested that strong quality control was fundamental to the city's long-term festival programme, if it was to continue to generate economic investment.
41. Generally, there was a perception that York was being held back due to a lack of confidence and that the city needed to raise its game. While there is an inherent belief that people will come to York because of its cultural offer, it is becoming an increasingly competitive market and other cities (e.g. Liverpool and Hull) are doing more to attract visitors. Many felt that York could extend the range of its visitor experiences, suggesting the city was not setting its sights high enough and could be in danger of being left behind.
42. Objective (ii) – CYC's Role in Supporting the City's Cultural Sector  
In recognition of the importance of the city's cultural sector, not only for tourism and employment, but also in attracting new businesses to the city, many of the consultees felt it was important for the Council to make a statement of commitment to the cultural sector to recognise their value to the city's economy. They also agreed that the Council could:
  - Strengthen its cultural leadership;
  - Better facilitate ways of bringing organisations together;

- Better articulate what we do as a city;
- Be clearer about York's position locally, regionally and nationally

43. In regard to MIY, a number of the consultees suggested there was a lack of clarity among the city's cultural sector about its function. For example, whilst MIY is working to tie together the sub-sectors of the city's cultural offer (as evidenced by initiatives such as Mediale and the development of digital arts), there was a feeling amongst some that MIY was competing with cultural bodies for Arts Council money, rather than supporting them. They agreed it would be beneficial if the Council took a strategic view with regards to culture, and MIY facilitated greater co-production, co-operation and collaboration in the city, and provided a co-ordinating role for joint funding bids in order to make sure the most is made of what funding is available.
44. Feedback from the Arts Council suggested they consider York to have quite high levels of cultural engagement against the national average, therefore York would not normally be a priority. However, they made it clear they would back the ambitions of any council which invests in arts and culture, or which finds innovative models for developing the cultural future of their city. Traditionally, the amount of funding granted by the Arts Council has been dependent on a city's ambition and commitment, the quality of its bid and the match funding it is prepared to put forward. All of these factors were taken into account when bids were assessed. More recently in recognition of the reduced budgets of local authorities, there has been less emphasis on match funding. In York, a lack of strategy appears to be affecting its ability to attract funding, but the Arts Council has indicated that if CYC made a clear commitment to the development of its cultural sub-sectors, it would respond.
45. A number of consultees drew attention to the problem of way finding around York. They agreed that signage was inadequate and the finger posts around the city were unsuitable for guiding visitors to lesser known places of interest.
46. MIY suggested that visitor enjoyment was being marred by incidents of anti-social behaviour. Evidence showed that because York is seen as a safe and easily accessible city with a concentration of entertainment venues, it has become a magnet for daytime drinkers on a Saturday. Whilst this contributes significantly to the hospitality industry, it was the view of a number of consultees, that it was having an adverse impact on the city centre, evidenced by a decrease in city-centre footfall on



Saturdays and an increase in footfall on Sundays. In their view it was damaging York's reputation and threatening the viability of some events.

47. Objective (iii) – Improving Joint Working Among Cultural Organisations  
The cultural providers acknowledged that standing still was not an option for them, whether artistically, in their learning and volunteering practice, or in their venue infrastructure. They agreed that while there had been some operational joint working between organisations for some time (e.g. sharing premises and box office functions), they could all benefit from more strategic collaborations and more collaborative promotion of the city as a place of world-class cultural importance.

## **Analysis**

48. Objective (i) – Attracting Economic Investment  
The Task Group recognised that the city's UNESCO designation provided a new communication channel for the city to promote its identity and its potential as a place to visit and in which to do business. They agreed that York's biggest opportunity was to exploit and promote its UNESCO status, by mobilising its wider cultural offer around it, wherever possible. York is involved in partnerships with two sub-groups, the UK Creative Cities, and the worldwide Media Arts Cities. All 180 Creative Cities are in active dialogue through exchange and conferences. It was agreed that the increased exposure to a refreshed identity for the city that would result from e.g. hosting the UNESCO Creative Cities Annual Conference, would be likely to increase the value of tourism and trade.
49. Referencing Medialife (see paragraphs 114-116 of Annex 2), the Task Group agreed that such initiatives were one of the ways in which different types of people might be attracted to the city, thereby expanding the opportunity for additional GVA.
50. Furthermore, the Task Group agreed the city's heritage attractions are among the best in the UK and should be used where ever possible to support opportunities to attract inward investment. They agreed that York has only just started to explore how it might use its heritage in new and imaginative ways to support the other cultural sub-sectors e.g. the City Walls could be used as a back drop for displaying visual/digital arts.
51. They also agreed with the consultees that new ways of attracting visitors could be developed, e.g.:
- Explore York and the Borthwick Institute both hold invaluable archives relating to York and the wider Yorkshire region which

presents the city with an opportunity to develop heritage tourism. The popularity of television programmes such as 'Who Do You Think You Are?' and the ease of discovering family trees via the internet has seen a huge growth in heritage tourism in other parts of the UK. The Task Group acknowledged that from an international perspective most of the ancestral tourists wanting to walk in the footsteps of their ancestors and learn more about their real life history, would be from the English speaking world, such as the United States, Canada, Australia, New Zealand and South Africa. In the main, they would be high-end visitors to the city staying in the more expensive hotels and eating at the more expensive restaurants. In addition there was also the potential of attracting UK visitors and day visitors, all of which would bring more money into the local economy.

- A project to raise the profile of its Roman history could have huge benefits for the city - the city celebrates its Viking heritage in many ways, including the Jorvik Viking Centre and Europe's biggest annual Viking festival. Whereas, the city's Roman past is overshadowed, even though its international status is built on its Roman foundations. Consultees suggested that greater emphasis should be placed on the city's Roman past.
- The city's youngsters could be encouraged to learn more about and better value its history and heritage. – The Task Group learnt that one of the current projects of the Cultural Education Partnership is the Culture Pledge. This lists cultural activities and experiences that a young person studying in York might expect to have access to, which includes items such as to walk the Walls and visit attractions e.g. the Minster, museums, York Theatre Royal and the National Railway Museum. The Task Group were pleased to note that the objective of the Pledge is to instil an appreciation of the city's cultural offer from an early age.

52. The Task Group noted that because of the change in the way the Business Register & Employment Survey (BRES) figures for 2016 had been recorded i.e. to now include solely PAYE based businesses with employment counts of less than 20, there was no evidence to show what if any increase there had been in the number of creative sector jobs in York since 2015 (see Annex 2 paragraph 45). The Task Group agreed that going forward this should be monitored and positive action taken to address the exodus of young people and start-up businesses (see paragraph 31 above). Acknowledging that the use of heritage buildings for businesses (see paragraph 22) and more investment to create additional SME work space could help maintain and increase the number

of creative sector jobs, thereby benefiting the economy, the Task Group questioned what more could be done to better utilise the city's stock of historic buildings. For example, using the empty space above existing city centre shops to help meet the demand from growing and start-up businesses, which are looking for accommodation in the city centre with easy access to the railway station. They agreed this would go some way to addressing the limited number of suitable available premises in the city for start-up businesses to grow and develop, which in turn may assist in addressing the drain of York's younger talented/skilled workforce. They accepted that the CYC may be able to influence this through its Asset Management Strategy and the future development of its commercial portfolio.

53. The Task Group acknowledged the issue of revellers and anti-social behaviour and its effect on the city centre particularly on a Saturday afternoon. They recognised that a co-ordinated response would be required if the issue was to be properly addressed and were pleased to note the ongoing work of the AVANTE Group and its Operation ERASE (see Annex 3). The Task Group took account of the good work already undertaken by the AVANTE Group, and the evidence that showed when there are family events in the city e.g. Sky Ride, instances of ASB were greatly reduced. They suggested that the Cultural Leaders Group could lead on the development of a complementary approach, using the city's cultural offer to either re-position families and visitors away from the drinking hotspots on a Saturday afternoon and/or increase the saturation of cultural visitors to the city centre on a Saturday afternoon in order to dissipate the public's perception of revellers and ASB.
54. In regard to the Bazalgette Review report, the Task Group questioned why York had not been featured as a creative cluster when it could be argued it had many of the pre-conditions for success as the places that had been included. They accepted that the determination of successful cities can be affected by such factors as their boundaries. In the case of York the local authority boundary excludes some areas where previous studies, for instance by Burns Owen Partnership in a 2010 report, counted a substantial number of creative businesses based outside of the city that look naturally to York for their networks and service requirements. The Task Group agreed that the creative profile of York and its role as a hub for those creative sector organisations based outside the city boundary, would benefit from improved promotion and partnership working with neighbouring authorities, in order to increase the opportunities for accessing future investment.

55. Objective (ii) – CYC's Role in Support of the City's Cultural Offer  
The Task Group agreed the Council's role and that of MIY needed clarity. The recognised that the Council's role should be one of strategic leadership, and agreed MIY's role should be to ensure appropriate collaborative working arrangements and support is in place to help steer the city's cultural partners and co-ordinate funding bids etc.
56. In consideration of the relationship between the Council, Make it York and Welcome to Yorkshire, the Task Group accepted that a stronger relationship between Make it York and Welcome to Yorkshire could bring additional benefits to York, e.g. Welcome to Yorkshire could be encouraged to further promote York's events and attractions on a broader regional, national and international stage. They agreed there were opportunities to be gained through the Yorkshire brand, without losing sight of York's own brand. They also agreed that as the Council was as an investor in both bodies, it was in a position to encourage positive change.
57. In regard to city centre open spaces, noting that the current infrastructure did not best facilitate the staging of major public events, they questioned how and when the Council would be progressing its intention to seek the necessary funding to undertake a '*Programme of maintenance and enhancement of the public realm in York city centre to improve its attractiveness as the 'shop window' of the city.*' as stated in the city's Economic Strategy.
58. They also recognised that maintaining cultural assets and supporting improvements in the city's cultural offer was costly. The Task Group looked at the potential for introducing a nominal hotel tax to help meet this cost and ease the burden on Council Tax payers who fund local services which are under pressure as a result of visitor numbers.

*The Task Group discovered that over the past decade or so, several UK cities have considered introducing an additional tax on overnight stays. Notable examples include Edinburgh, Camden and most recently Bath, but none have been introduced as yet. The specified purpose of this tax would be to contribute towards the cost of maintaining public realm spaces e.g. rubbish collection etc. The Task Group recognised that in York city centre some of this work is already being done through the Business Improvement District, and as it is not within a local authority's current power to introduce this additional tax on a mandatory basis, its future implementation would be dependent on gaining*

*additional devolved power from Government or hotels signing up on a voluntary basis. The Task Group therefore agreed that this was not the way forward for York.*

59. Objective (iii) – Improving Joint Working Among Cultural Organisations  
The Task Group noted that the ‘Vespertine’ programme which took place 2014-16 (see paragraphs 117-118 of Annex 2) was a result of collaboration between arts and culture partners. Recognising the success of that event, and the benefits that improved joint working could bring, the Task Group questioned how best to bring together those working in the arts and cultural sectors and agreed with the consultees that the city would benefit from a more co-ordinated approach and that MIY should be the conduit to making this happen – see paragraphs 35 & 45 above.
60. They also suggested that linking the cross-promotion of cultural attractions into improved way-finding opportunities would be a positive way forward and would benefit the smaller less well known attractions. They were therefore pleased to note the inclusion in the Economic Strategy of a commitment by the Council and its partners to *‘Roll out a comprehensive creative approach to digital signposting / communicating what’s on and things to do in the city, which is accessible both virtually (e.g. through apps) and physically at key points in the city’*.
61. Finally, the Task Group accepted that as employers and through their contribution to the city’s cultural offer and visitor experience, the churches and faith communities were a driver for attracting tourists, businesses and incomers. They therefore agreed they should be included in any conversation about enhanced co-operation across the cultural sub-sectors.

## **Conclusions**

62. The Task Group agreed:
- The value of the cultural offer on the economy of York cannot be overestimated, but it is difficult to monetise and isolate the added value or net impact of the activities attracted to or embedded within it.
  - The cultural offer’s three sub-sectors (see paragraph 11) are all drivers for attracting economic investment.

- York has yet to take full advantage of its UNESCO designation or meet all of its UNESCO obligations. It needs to be more ambitious and co-ordinated in terms of its creative credentials and its full cultural offer, and programming and promotion needs to be improved, with more effective collaboration between cultural organisations. The key going forward is initiatives such as Mediale which successfully tie together a modern and contemporary cultural offer with the city's heritage.
- The Council should demonstrate its commitment to the city's cultural sector and its ability to attract inward investment, by taking a strategic lead, giving more clarity on its role, what its expectations for the city are, what it can offer and what needs to be promoted.
- The role of Make it York should be clarified through the renewing of its Service Level Agreement
- The economy would benefit more from investment in the creation of work spaces for SMEs in and around the city centre.
- The number of tourists attracted to York places a lot of pressure on the city centre infrastructure. It is therefore important that the Council and its partners' progress their commitment to a programme of maintenance and enhancement of the public realm in the city centre (as detailed in the city's Economic Strategy - see paragraph 56), as this would also ensure the safety and viability of major outdoor events.
- It is essential the visitor experience is joined up and way-finding needs to improve. It is therefore important that the Council and its partners progress their commitment to this, as detailed in the city's Economic Strategy (see paragraph 60).

### **Draft Review Recommendations**

63. In order to advance the aim of York's Economic Strategy to 'Make a Fresh Loud Statement of Cultural & Visual Identity', and positively influence the Art Council's consideration of future funding bids, the Task Group agreed to recommend the following:
  - i. The Council should demonstrate its commitment to the city's cultural sector by progressing the development and promotion of a clearly defined Cultural Strategy with the Cultural Leaders Group, with the

Council showing leadership in its creation and adoption. This should include the provision of:

- A one-off sum of £20k early in the new financial year, to support its development;
  - An ongoing sum of £6k annually for secretarial services;
- ii. The Council should support the Cultural Leaders Group in working as a cohesive unit to build and achieve wide acceptance of that Cultural Strategy
- iii. As part of renewing MIY's Service Level Agreement, the Council should clarify the role of Make It York in supporting York's cultural sector and offer, and ensure it:
- Develops a narrative about York's ambitions with cultural partners;
  - Improves its collaboration with Welcome to Yorkshire
  - Facilitates greater collaboration and co-operation between the cultural sub-sectors in the city
  - Co-ordinates future funding bids to the benefit of all cultural providers
- vi. The Council should work with BID to explore all means available of achieving improvements to the public realm in the city centre, particularly Parliament Street.
- vii. The Council should seek ways of protecting and utilising the city's stock of historic buildings to attract more growing business, rather than increasing residential use, by encouraging imaginative approaches to redevelopment through the Local Plan and master-planning frameworks, and through its Asset Management Strategy and the future development of its commercial portfolio.

64. The Task Group recommends that Make It York:

- iv. Concentrates its focus on higher quality events and festivals in the city centre to protect the York festival brand and maximise their GVA.
- v. Works with BID and other interested parties e.g. York Civic Trust, to devise a comprehensive 21<sup>st</sup> century system of way-finding within the city using all available methods and technologies incorporating smaller cultural providers into those way-finding opportunities to expand the city's promotion of its full cultural offer.

65. The Task Group recommends that the Cultural Leaders Group:
- viii. Explores the suggestions for new initiatives identified through the consultation for this review, as listed at paragraph 51 above.

### **Options**

66. Members are asked to consider the report, its annexes and its draft recommendations and can:
- a) Either identify any additional work needed to conclude the review or sign the review off as completed;
  - b) Indicate any amendments or additions they may wish to make

### **Council Plan**

67. This review supports A Prosperous City For All; A Focus on Frontline Services and A Council That Listens to Residents elements of the Council's Plan 2015-19.

### **Implications**

68. The following implications have been identified as a result of the review draft recommendations in paragraphs 63-66 above.
- **Financial:** To support the Cultural Leaders' Group by making available secretarial services and alike would require a budget of around £6k p.a. and this would need to be the subject of a growth bid within the budget process. A one-off sum to support the development of a cultural strategy would need to be in the region of £20k and again would need to be subject of a growth bid within the budget process.
  - **Human Resources (HR)** If the recommendations are agreed, secretarial support will be provided in accordance with the council's HR processes.
69. There are no Legal, Equalities, Crime & Disorder, IT, Property or other implications associated with the recommendations arising from this review.

### **Risk Management**



70. York is facing a growing challenge from other towns and cities throughout the UK that are actively promoting their own heritage, arts and culture offers. If York were to slip down the UK list of key destination cities this could impact on both the tourism economy and further inward investment. There is therefore a clear risk to the city's economy if the city has no defined strategy in place to promote and co-ordinate its offer.

### **Report Recommendations**

71. Having considered the information within this draft final report and its annexes, Members are asked to:
- Identify whether any additional work is required to conclude this review and;
  - Consider the draft recommendations arising from the review as shown in paragraphs 63-66 above,

Reason: To conclude the work of this review in line with scrutiny procedures and protocols, and enable this review final report to be presented to the Executive.

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**Report Approved** ☒ **Date** 03/11/2017

**Wards Affected:**

**All**



For further information please contact the author of the report

**Background Papers:** None

**Annexes:**

Annex 1 – Information Gathered

Annex 2 – Information Gathered from Consultees

Annex 3 – Information on work of the AVANTE Group

**Abbreviations:**

BAFTA – British Academy of Film & Television Arts

BRES – Business Register & Employment Survey

CYC – City of York Council

DC Lab – Digital Creativity Laboratory

DCMS – Department of Culture, Media and Sports

EDAT – Economic Development & Transport Policy & Scrutiny Committee

EU – European Union

FTE – Full Time Equivalent

GDP – Gross Domestic Product

GVA – Gross Value Added

IT – Information Technology

MIY – Make It York

NPO – National Portfolio Organisation

PAYE – Pay As You Earn

UNESCO – United Nations Educational, Scientific & Cultural Organisation

YAT – York Archaeology Trust

YMT – York Museum Trust

YTR – York Theatre Royal

WHS – World Heritage Sites

## **Impact of the Arts and Culture Sectors on the Economy of York Scrutiny Review**

### **Information Gathered**

1. In support of the review objectives listed in paragraph 5 of the final report, the Task Group considered information on the following:
  - York's Local Plan, which now has a stronger cultural element;
  - Regional & National Information & Comparison Data provided by Historic England;
  - The Culture White Paper published by the Department of Culture, Media & Sport in March 2016;
  - Heritage Lottery Fund Research

### **Local Plan**

2. Since the Task Group started its work on this review the cultural element of the Local Plan has been strengthened with additions including:

#### **Vision and Development Principles**

- York aspires to be a city whose special qualities and distinctiveness are recognised worldwide. The Local Plan aims to deliver sustainable patterns and forms of development to support this ambition and the delivery of the city's economic, environmental and social objectives. This will include ensuring that the city's place making and spatial planning policies reflect its heritage and contemporary culture contributing to the economic and social welfare of the community whilst conserving and enhancing its unique historic, cultural and natural environmental assets. The plan will ensure that the vision and outcomes are delivered in a sustainable way that recognises the challenges of climate change, protects residents from environmental impacts and promotes social, economic and cultural wellbeing.
- The Plan recognises the critical importance of York city centre as the economic, social and cultural heart of the area. By the end of the plan period, York city centre will have strengthened its role as a regional commercial, shopping, leisure, culture, tourism and entertainment destination through:
  - ensuring development contributes to the creation of a world class, high quality, accessible public realm;

- increasing the supply of modern retail units, enhancing department store representation to attract a broader range and quality of multiple retailers to trade whilst enabling the growth of the already strong, quality, independent sector;
  - improving the tourism, cultural and leisure offer by ensuring a flexible approach to the use of land;
  - ensuring development sustains, enhances and adds values to York's culture;
  - developing an improved high quality affordable office space offer for small enterprises and start-ups in the arts, creative, digital media and related industries;
  - protecting and enhancing its unique historic and cultural assets;
  - protecting and enhancing its existing office provision complemented by commercial development on the adjacent York Central site; and
  - pursuing improvements to sustainable transport infrastructure.
- The built environment is the most tangible expression of a city's character and culture – its past, its present, its aspirations for the future. Over the plan period, the Local Plan will help York to safeguard its outstanding heritage for future generations by promoting development which respects the city's special character and contemporary culture and encourages opportunities for rediscovering and reinterpreting those assets which make it an attractive, beautiful and accessible city. Enhancing York's physical appearance, improving accessibility and improving its image and perception are vital if the city is to increase investment, employment, and wealth and wellbeing.
- York's past informs its future so both its heritage and its approach to innovation are important for the city's future success and wellbeing. The city's unique historic character and setting is an essential component of its continued economic success as well as being valuable in its own right. York's outstanding architectural and archaeological heritage contributes to the city's special significance, distinctiveness and sense of place. Implementing the Local Plan should ensure that the city's heritage assets are preserved and enhanced. These assets include the architecture and archaeology of its historic centre, its skyline, views, street patterns, the Minster and its precinct, the Medieval and Roman walls, Clifford's Tower, Museum Gardens and other open spaces.

- York is also a UNESCO City of Media Arts. Given this status, it is equally important that York increasingly becomes, and is perceived as, a forward-looking and creative city, one that values learning, retains its graduates, attracts investment, and supports its creative, digital, and innovative industries. In this, place-based and proactive spatial planning and the encouragement of excellent design in buildings and public spaces, have an important role to play. Protection and enhancement of the city's arts and cultural assets should be part of the Local Plan's implementation, with new assets and resources created whenever possible.
- By the end of the plan period York's Green Infrastructure, including open space, landscape, geo-diversity, bio-diversity and the natural environment, should have been both conserved and enhanced. Its role in promoting the city's economic, cultural and social aspirations, particularly in terms of contributing to a beautiful, legible, accessible and healthy city, should have been optimised.

#### Economy and Retail

- A key aim of the Council's Economic Strategy 2016 (see section 7 page 19 of Strategy), is to continue to creatively develop York's tourism and culture offer and to raise the city's profile as a quality visitor destination.
- Tourism, leisure and cultural developments should be directed towards the city centre or other particularly significant attraction locations like York Racecourse with its conferencing facilities.
- Where suitable sites are not available in the city centre, sites in edge- of-centre locations will be considered and, if no suitable sites are available in any of the preferred locations, out-of-centre sites will be considered. Where edge-of-centre or out-of-centre sites are considered, preference will be given within each category to accessible sites that are well connected to the city centre.

#### Place-making, Design and Culture

- Good place-making is the key driver of this Plan. A Local Plan is a spatial planning policy, but spatial planning and the overall planning and making of 'place' are inseparable.
- Successful place-making is a creative, practical, and continual process. It is underpinned by a holistic approach to community wellbeing that embraces health, economy, culture, and the

environment. It requires leadership combined with clear and widely-owned policy and practice developed in partnership between a local authority and all of its stakeholders. It is typified by strong and ongoing community engagement, as well as professional involvement, in the planning, design and management of new and regenerated places.

- York is a unique place with special character. History has created one part of this character, and the city's historic built and historic environment is of outstanding quality. The other part of York's specialness is its expression of contemporary culture and its aspiration. Our vision is for a city dedicated to innovation melded seamlessly with its heritage and expressed through a future-oriented culture of creativity, entrepreneurship, and learning.
- This integration of past and future, of tradition and innovation has been central to York's economic success in the past and will continue to be so in the future. York's special characteristics are key benchmarks when considering the quality of future development and the contribution it will make to the city's social, economic, environmental and cultural wellbeing.
- Development proposals should be of high design standards at all scales – from master planning to individual building and open space design. To complement this legacy these developments should not attempt to ape the past but instead should simply be based on good design. Good design should be fit for purpose, sustainable, efficient, coherent, flexible, responsive to context, attractive and a clear expression of the requirement of a particular brief. It should seek to add to the city's overall cultural quality as a place, and also enhance its cultural capacity – its ability to create opportunities for cultural creation, expression, learning, sharing, and enjoyment. Good design can be demonstrated through engagement in peer-review design panels and meaningful public engagement and this will be encouraged and supported.
- Good place-making and design and the culture identity that arises from them starts with a clear understanding of what makes the city and its surrounding villages.
- There are a number of existing studies that will assist the process of analysing character and significance, and they should always be used to guide development proposals. These include Conservation

Area Character Appraisals and Statements, the City of York Streetscape Strategy and Guidance (2014), the 2014 review of the 'York Development and Archaeology Study', the York Heritage Topic Paper the Historic Environment Characterisation Project, York New City Beautiful (2010). Reference should also be made to the background studies referred to in Section 9: Green Infrastructure and Section 10: Approach to Managing Appropriate Development in the Green Belt and, where relevant, Village Design Statements and Neighbourhood Plans. Complementing this, a Cultural Strategy for York is also currently in the early stages of development.

- In meeting the policy requirements of this section of the Plan, applicants will be required to describe the significance of heritage assets likely to be affected by development, including any contribution made by their setting, most likely set out in a supporting Heritage Statement. The extent of such an appraisal should be proportionate to the asset's importance and no more than is sufficient to understand the impact of the proposal on its significance. The Council will also want to understand how the city's culture and cultural capacity will be affected by developments. Applicants in appropriate developments will be required to submit a Cultural Wellbeing Plan.
- Cultural wellbeing is identified as one of the twelve core planning principles underpinning both plan-making and decision-making in the National Planning Policy Framework (NPPF). Development proposals will be supported where they are designed to sustain, enhance, and add value to the special qualities and significance of York's cultural character, assets, capacity, activities, and opportunities for access.
  - i) Development proposals will be supported where they:
    - Enable and promote the delivery of new cultural facilities and/or activities and services such as permanent and temporary public arts
    - Provide facilities, opportunities, and/or resources for cultural programmes and activities, during an/or after the development period
    - Do not cause the loss of cultural facilities, activities, or services
    - Do not cause the loss of venues or spaces, including in the public realm, that deliver cultural opportunities, activities, or

## services

- ii) The master planning on all strategic sites, of whatever scale, will need to include an assessment of the current status and need relating to culture and its provision. This assessment should be included in a Cultural Wellbeing Plan, which should also describe how the four criteria of above section (i) are satisfied. In addition to demonstrating enablement of cultural facilities and/or services, the Plan can also refer to:
- Citizenship through participation
  - Encouragement through leadership
  - Fostering long term benefits
  - Encouragement of diversity
- Culture can and does contribute positively to York's local character by responding to the underlying structure, distinctive patterns and forms of development and local culture. Development should deliver a multi-functional public realm comprising streets and spaces that can accommodate a range of appropriate arts and cultural uses and activities both now and in the future, providing animation, vitality and inclusion.
- Major development schemes and significant schemes at whatever scale should also enable the delivery of permanent and temporary public arts, promoting a multi-disciplinary approach to commissioning artists in the design process itself. Facilities and resources, including funding, for arts and cultural activity both within and beyond the development period itself (for example via a legacy trust), will also be supported.
- Cultural facilities add value and support to community participation, wellbeing and development. The City of York's residents demonstrate pride in their cultural diversity. The City of York is keen to protect these capacities to engender community cohesion and civic pride. As part of good place-making, cultural quality, assets, and opportunities can also add to the attractiveness and value of development schemes.
- When a new cultural facility or programme is required, it should be accessible for local residents as well as visitors, and be a place where cultural diversity can be explored and enjoyed. Furthermore,



to build on existing opportunities, proposed developments which have a significant impact, at whatever scale and those directly related to the cultural industries, will be required to contribute towards enhancing public realm through the promotion of the public arts, cultural diversity and provision of additional facilities and activities where appropriate.

- Where needed to manage and promote cultural wellbeing, the council will seek to work with stakeholders as appropriate in the preparation of sustaining, enhancing and adding.

### Cultural Heritage Landscape

The Aim of this part of the Plan is to:

- Conserve or enhance York's historic environment, cultural heritage, character and setting
  - Preserve or enhance the special character and setting of the historic city
  - Promote or enhance local culture
  - Preserve or enhance designated and non-designated heritage assets and their setting
  - Preserve or enhance those elements which contribute to the 6 Principle Characteristics of the City as identified in the Heritage Topic Paper.
- Protect and enhance York's natural and built landscape
  - Preserve or enhance the landscape including areas of landscape value
  - Protect or enhance geologically important sites;
  - Promote high quality design in context with its urban and rural landscape

### **Regional Information**

3. In October 2016, Historic England published Heritage and the Economy 2016 presenting key facts and figures which illustrate the benefits that the historic environment brings to the economy.
4. The headline statistics are:
  - Heritage directly contributed over £756.5m in GVA in Yorkshire and the Humber in 2013;

- In 2013, there were over 14,400 people directly employed in heritage in Yorkshire and the Humber ;
- In 2014, heritage tourism generated nearly £1.1 billion in spending by domestic and international visitors in Yorkshire and the Humber;
- Repair and maintenance of historic buildings in Yorkshire and the Humber directly generated £682m in heritage-related construction sector output in 2015.

5. Historic England found that heritage directly contributed over £756.5m in GVA in Yorkshire and the Humber in 2013. This figure increases to over £1.6 billion when direct, indirect and induced heritage GVA is combined. This is equivalent to 1.6% of total GVA in Yorkshire and the Humber.

6. Total GVA (m) (Direct, indirect and induced)

Area	2011	2012	2013
Yorkshire & the Humber	£1,980.7	£1,724.4	£1,638.4
% of total GVA for Yorkshire & Humber	2.0%	1.7%	1.6%
England	£21,363	£21.116	£21,697
% of total GVA for England	1.7%	1.7%	1.6%

7. In 2013, there were over 14,400 people directly employed in heritage in Yorkshire and the Humber. Including indirect and induced employment, this number increases to over 28,900. The number of people employed has declined from 32,600 in 2011 primarily due to a decline in heritage construction employment.

8. In 2014, heritage tourism generated nearly £1.1 billion in spending by domestic and international visitors in Yorkshire and the Humber. In total, it is estimated that there were 1.6m domestic overnight trips, 15.5m domestic day trips and 710,000 international visits to Yorkshire and the Humber in 2014.

Heritage-related visitors (2014)	Heritage -related spend (m)	Heritage-related trips/visits (m)
<b>Domestic overnight</b>		
Yorkshire and the Humber	£342	1.60
England	£3,549	15.94

<b>Domestic day</b>		
Yorkshire and the Humber	£457	15.5
England	£4,978	156.43
<b>International</b>		
Yorkshire and the Humber	£295	0.71
England	£9,856	17.38
<b>Total (domestic &amp; international)</b>		
Yorkshire and the Humber	£1,094	17.8
England	£18,383	192.7

9. Compared to the national average, as shown in the figures below, heritage-related domestic visit spending provides a proportionally higher source of tourism income in Yorkshire and the Humber than nationally. Consequently, heritage-related international visitor spend accounts for a significantly lower proportion of tourism income in the region.
10. Distribution of total heritage spend

	<b>England</b>	<b>Yorkshire and the Humber</b>
Domestic overnight	19%	31%
Domestic day	27%	42%
International visits	54%	27%

11. Heritage Construction  
Heritage-related construction plays an important part of Yorkshire and the Humber's construction industry and the historic environment forms a vital part of our nation's infrastructure, providing premises for businesses; homes for residents; and amenities and utilities for communities and visitors.
12. Repair and maintenance of historic buildings in Yorkshire and the Humber directly generated £682m in heritage-related construction sector output in 2015. This is equivalent to 7.1% of total construction output or 22% of the repair and maintenance output.

<b>Yorkshire &amp; the Humber construction output (m)</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
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Heritage-related construction	£734	£705	£720	£792	£682
All Construction	£8,967	£8,573	£8,974	£10,249	£9,584
Heritage as a % of total construction	8.2%	8.2%	8.0%	7.7%	7.1%

### National Information

13. Historic England noted that while Heritage is an important source of economic growth and prosperity it is difficult to monetise and isolate the added value or net impact of heritage from the activities attracted to it or embedded within it.
14. The economic value and impact of heritage can come from a variety of sectors and functions, including: tourism; the demand from the construction sector to service heritage buildings; conservation activity; economic activity in historic buildings; investment in the investigation, research and display of archaeological sites and structures and education.
15. In 2013, heritage directly generated £10 billion in GVA in England. If indirect and induced effects are considered, heritage sectors' contribution to GVA increases to £21.7 billion. This is equivalent to 2% of national GVA. In 2013, there were 164,100 direct heritage jobs in England. If indirect and induced heritage employment is included then this figure rises to 328,700 heritage jobs or 1% of total national employment.
16. In total, domestic and international heritage-related visits generated £18.4bn in expenditure in England in 2014. This level of heritage tourism expenditure contributed £11.0bn in GDP and 285,700 jobs. If indirect effects are included this rises to £24.2bn in GDP in 2014. Heritage tourism expenditure accounted for 22% of all tourist spending in 2014.
17. Domestic overnight visits: 17% of all domestic overnight trips in England in 2014 or 15.7 million trips were heritage-related trips. Domestic overnight visitors spent £3.6bn on heritage-related trips in 2014.
18. Domestic day visits: In 2014, it is estimated that 12% of the total or 159.4 million day visits were motivated by heritage-related activities.

Domestic Day visitors spent £4.97bn on heritage-related day visits in 2014.

19. International visits: There were 15,392,000 heritage-related international visits in 2014. There has been a steady increase since 2010. International tourists spent £9.86bn on heritage-related visits in 2014.
20. Historic England noted the ways in which heritage tourism generates benefits in the local economy. These include:
  - Investing in the historic environment generates economic returns for local places. On average, £1 of public sector expenditure on heritage-led regeneration generates £1.60 additional economic activity over a 10-year period.
  - Visiting heritage generates money for the local economy – for every £1 spent as part of a heritage visit, 32p is spent on site and the remaining 68p is spent in local businesses: restaurants, cafes, hotels and shops.
  - On average, half of the jobs created by historic visitor attractions are not on the site, but in the wider economy.
  - UNESCO estimates the financial benefit of World Heritage Sites (WHS) to the UK to be £85 million per year. The WHS brand is a significant marketing tool, which increases tourist numbers and spend, local employment, house prices and local economies.
  - 14% of visitors stayed in the area as a result of a historic houses/castles attraction, while 15% stayed in the area as a result of visiting other historic properties.
  - Three-quarters of adults (73.2%) in England, or approximately 40 million people, visited a heritage site at least once in 2015/ 16, compared to 69.9% in 2005/06.
  - When asked about their most recent UK holiday in 2015, 63% domestic travellers cited being able to visit a historic building or monument as their 'sole reason' or a 'very important reason' why they took their holiday.
  - Heritage tourism is more popular in Britain, compared with most of Europe – UK citizens have the 4th highest participation rates for visiting a historical monument or archaeological site in the past 12 months (65%) –13 percentage points higher than the EU average.

- 30% of overseas visitors cite heritage as the biggest single motivation for their visit to the UK – the largest single factor for non-business visitors.
- Only shopping (71%), visiting parks or gardens (54%), or going to the pub (50%) were as, or more, popular activities among visitors.
- Heritage-related construction plays an important part in England's construction industry and heritage construction output is estimated at £9.7 billion for 2016.

21. Historic England concludes that tourism is expected to grow in the future. It was estimated in 2013 that the UK tourism economy would grow by 3.8% a year between 2013 and 2018, which is higher than sectors such as manufacturing, construction and retail. Visit Britain forecasts that the tourism industry will be worth over £257 billion by 2015 – just under 10% of UK GDP and supporting almost 3.8 million jobs, which is around 11% of the total UK number.

### **The Culture White Paper**

22. The White Paper published by the Department for Culture, Media and Sport in March 2016 put the 2014 economic contribution of culture to be £5.6 billion. This contribution from museums, galleries libraries and the arts represents 0.3% of the total UK economy, up 59% (in normal terms) since 2010, a massive increase compared to total economic growth of 16% (in normal terms) over the same period.
23. The number of people employed in the cultural and creative sectors has been increasing since 2011 and now stands at 321,000.
24. The fact that the UK's culture is seen so positively around the world increases its contribution to the economy beyond its direct impact. This is evident in tourism. Research by the British Council shows that cultural attractions are the most commonly mentioned factor in terms of what makes the UK an attractive place to visit while the arts was the third most commonly mentioned reason.
25. The White paper specifically mentions Hull as an example of how cultural place-making can shape the fortunes of regions, cities, towns and villages. Having been chosen as the UK City of Culture 2017, it is now on the Rough Guide list of the top 10 world cities to visit. It is no coincidence that Hull is attracting new business and jobs. The award of

UK City of Culture is expected to be worth some £60 million to the local economy in 2017.

26. A January 2016 government briefing paper on support for the UK's creative industries and their contribution to the economy defined creative industries sector as including advertising, architecture, design, media, IT and computer services, music and publishing.
27. The economic output in the creative industries was £84.1 billion in 2014. Growth in the creative industries has been faster than the overall economy in recent years. Between 2009 and 2014 economic output (in cash terms) of the creative industries increased by 45.9% in total compared with 20.0% for the economy as a whole.
28. There were 1.9 million jobs in the creative industries in 2015, an increase of 3.2% compared with 2014 and up by 19.5% since 2011. An estimated 640,000 of these jobs are in 'IT, software and computer services', with a further 286,000 in 'music, performing and visual arts' and 231,000 in 'film, TV, video, radio and photography'. Creative industries accounted for 5.8% of all jobs in the UK in 2015.
29. 60% of jobs in the creative industries were filled by people who have at least a degree-level qualification compared to 33% for all jobs in the UK.

### **Heritage Lottery Fund Research**

30. A Heritage Lottery Fund study "New Ideas Need Old Buildings" published in 2013 following research across 56 different towns and cities, including York, noted that historic buildings and the historic quarters of major towns and cities are the places where new ideas and new growth are most likely to happen. The research shows that the commercial businesses based in the historic buildings of major cities are more productive and generate more wealth than is the average for all commercial businesses across the whole economy.
31. The research findings back up an idea about economic development that has been understood for some decades – that innovation, new products, new services and new economic growth – flourish best in cities possessing a good stock of historic, distinctive buildings. It found that businesses can set up in older buildings with lower risk because of lower costs. Older buildings are suitable for a huge variety of business

use. They have character and colour, so creating the distinctive leisure quarters of cities and an atmosphere that fosters creativity.

32. The research found that:

- More than 130,000 businesses operating in listed buildings in the UK.
- In major cities, historic buildings have a greater concentration of businesses linked to the creative and knowledge economy than across the UK as a whole.
- The areas of cities where there is a higher density of listed buildings also have a higher concentration of businesses linked to the creative and knowledge economy.
- Listed buildings are far more likely to be occupied by the types of independent non-branded business that give places a sense of distinctiveness, authenticity and diversity.
- Listed buildings are highly attractive to entrepreneurs and start-up businesses in the creative and cultural sector. Creative industry businesses based in historic buildings that were surveyed for the research included a very high proportion of start-ups – with over 60% established in the past three years.
- Listed buildings are three times more likely to be used as a fashion retail shop than non-listed.
- Historic buildings are highly suited to a great variety of uses and are now used for a wide range of manufacturing activities from publishing to jewellery and clothing factories – whilst former industrial heritage buildings have been re-used for residential, office, retail and leisure.
- Across the UK, the businesses based in listed buildings are highly productive and make an estimated annual contribution to UK GDP of £47billion and employ approximately 1.4 million people. This represents 3.5% of the UK's GVA and 5% of total UK employment. Not all historic buildings are listed – adding the non-listed would make these figures even higher.
- In the places surveyed, a commercial business based in a listed building generates an average of £308,000 in GVA per year – 4.4% higher than the average for all commercial businesses across the UK. Rather than being a drag on productivity, listed buildings attract businesses in the most productive sectors of the economy.



- The 'heritage premium' associated with the occupation of these listed buildings – the extra GVA they generate over and above the amount generated by an equivalent number of businesses in non-listed buildings – is £13,000 per business per year.

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## Impact of the Arts and Culture Sectors on the Economy of York Scrutiny Review

### Information Gathered from Consultees

1. In support of the review, the Task Group held a number of meetings to meet individually with City of York Council's Chief Executive; the Corporate Director Children, Education & Communities, and the Assistant Director Communities and Equalities.
2. Previously **the Council (CYC)** had a defined leisure and culture function with a dedicated team delivering those services, but this is no longer the case, and it is not the Council's responsibility to ensure the provision of the city's cultural offer. The Council contributes both to Make It York and Welcome to Yorkshire and the Council's role is now that of a participant and collaborator – influencing and linking into the networks that are in place. Those arrangements are important as they enable CYC to have a voice; they ensure that a coherent approach is taken and that the city's cultural offer does not become too disparate.
3. The Council is a member of a new Cultural Leaders' Group, which is emerging as a vibrant leader in the cultural sector (see paragraph 10 below). Through this the Council has an important role to play in providing a strategic steer and helping to set a shared vision for the city. The Council has also signed up to the York Economic Strategy, through which it can influence clear priorities.
4. The cultural sector in York, as in other cities, is quite competitive, and the Council has been successful in helping develop some areas, such as the sharing of data. It is also showing leadership through the design and master planning of regeneration projects and has a strong custodial role to ensure the quality of those products is not lost.
5. Discussions have been taking place to identify whether the city could do more to maximise the benefits of working on a regional basis to promote tourism. This could involve York joining up with Hull, Harrogate and other destinations, to benefit from major events on offer in across the region.
6. Issues Raised
  - There is a concern that the city is not setting its sights high enough and that if it is not agile enough it will be left behind. For example,

there are events being held across Yorkshire in which York could play a part, and it is important to look at the opportunities to be gained through the Yorkshire brand without losing York's own brand. The city should also consider how it can benefit, if Leeds is successful in its bid to be the European Capital of Culture for 2023.

- York should extend the range of its visitor experiences - there is huge potential in developing the early evening economy and there are aspects of the city's heritage which could be better promoted including the city walls, St Leonard's Hospital, York's Roman history, and opportunities to increase footfall on the Micklegate side of the river.
- The city could attract world class events but the variable quality of festivals held in the city may be undermining the brand.
- The biggest risk is if the Council did not continue to have an influence in the city's cultural offer.

7. Later in the review, the Task Group met with the Executive Member for Culture, Leisure and Tourism who agreed the Council needs to give more of a strategic lead.

#### 8. Issues Raised

- The Council could strengthen its cultural leadership and facilitate ways of bringing various organisations together. It could also look at what it wants from Make It York; better articulate what we do as a city, and be clear about York's position locally, regionally and nationally.
- York needs clarity about its role in the wider Yorkshire offer and steps could be taken to get Make It York and Welcome to Yorkshire to work better together.
- The city's cultural offer is a driver for attracting economic investment.
- It is felt the city is not making the most of its valuable attractions.

9. Early in the review the Task Group met with the Chair of **York@Large**.

*York@Large is the city's cultural partnership. Its members work together to communicate what's happening in York as a way of increasing participation. They also encourage investment in the city's attractions and new events in order to support the local economy and to make York a more lively, creative and active city.*

*The operational plan for York@Large has two general objectives – to raise the wider awareness of contemporary culture and creative industries as strengths of York, and to build more effective structures for delivery.*

10. A 'Cultural Leaders' Group' was recently formed which pulls together high-level creative and cultural leaders and managers from the larger organisations in York, including English Heritage, York Museums Trust, Aesthetica, Make It York, the National Trust, the National Railway Museum and the new Guild of Media Arts (for further information on the Guild, see paragraphs 13-15 below).
11. When York was designated UNESCO City of media Arts in December 2014 the motivation was to raise the social, cultural and economic standing of the city. The bid promoted York as a place that is culturally-rich and creatively-pioneering, a place where technology and art is used to breath new life into its heritage, where this strength has been cultivated through £100m investment in media arts infrastructure and by becoming one of the first UK's first Super-Connected Cities, and described how York was committed to using creativity and culture to develop the city further.
12. Issues Raised by York@Large
  - In terms of future development, UNESCO accreditation is very important and the city should get behind this as it presents a huge opportunity to portray York not just as a heritage city but as a contemporary city.
13. The **Guild of Media Arts** was created to recognise and build on York's status as the first UNESCO City of Media Arts in the UK and became the first entirely new guild in York for around 700 years. It began holding formal meetings in late 2015 and now has more than 200 members including media artists, the heritage sector, cultural makers and creative industries. While big companies are involved, the Guild also focuses on businesses that need help to grow and develop.

*The aims of the Guild are to unlock the full benefits of the city's UNESCO designation ensuring that the UNESCO obligations are met in full; to champion York's growing creative credentials and strengthen York's cultural and creative industries; to ensure all York citizens' benefit from the opportunities offered by being part of the global Creative Cities Network; to retain the incredibly talented creative people attracted to York by the city's universities; and to provide a platform for members to help solve each others' problems.*

14. Working with Make It York, one of the Guild's primary objectives is Mediale, a major international biennial festival to showcase media arts – for further information on Mediale, see paragraphs 114-116.
15. The Guild has links with other UNESCO cities throughout Europe and this international framework provides York with the opportunity to be seen, via the Guild, as a city capable of growing the creative sector alongside its other cultural sectors.
16. As a body, the Guild is able to cross technology and the arts to create a strong way forward for economics and business. The kind of jobs it tries to promote are in the high wage bands, although many of its members are self-employed so are not captured through PAYE data.
17. The Guild is creating an environment in which businesses and creative enterprises can flourish using culture and creativity as a driver. Big companies are involved but a focus is also at grassroots level of business that need help to grow and develop. The city's universities attract incredibly talented people and the aim is to keep them in York.
18. Issues Raised by the Guild
  - The Guild considers the city's Local Plan to be strong on heritage but less strong on other cultural sectors and it wants to join that up.
  - The Council has an important role to play in creating the right policy framework to bring additional resources into the city. It needs to facilitate the development of employment opportunities and promote the city as a brilliant place to live.
  - The Council should be more rigorous about understanding why people leave the city - York is a small and beautiful city with a good quality of life that people want to live in and businesses value being in York because they can find good, talented recruits. However, many younger people leave the city to pursue their careers.
  - One of the barriers to keeping young start-up businesses in the city is thought to be its inability to provide good premises with the capacity to grow and develop.
19. Early in the review the Task Group met with the Chair of **Make It York (MIY)** and later with its Managing Director.

*Make It York is the city's destination management organisation and has the overarching remit to market the city and its surroundings as an exciting place to live, study, visit and do business. Its remit covers leisure and business tourism, city centre management, festivals and events, business support and inward investment. Visit York is a part of MIY and is the leisure tourism brand. Under the brand Visit York, MIY's aim is to market the city as a must-see world-class destination to the leisure visitor and ensure investment to develop the quality of tourism in York. The Council's service level agreement with Make it York is due to be renewed in 2018.*

20. Part of MIY's role is to ensure the three key themes it is developing complement each other in order to give a clear view going forward on what is good for residents, tourists and cultural visitors. These three themes are:
  - A refresh and update of the tourism strategy
  - An events and festivals strategy
  - The establishment of a cultural strategy through the Cultural Leaders' Group.
21. MIY works with a number of other bodies. It supports the work of the Cultural Leaders' Group and carries out its administration functions. It has also done a lot of work with York@Large on cultural usage within the built environment, to ensure the way this works is integrated and that there is a shared vision for the future.
22. Data produced by MIY using the latest annual data available, shows that:
  - There were 3,057,097 visits to York's attractions;
  - 207,706 were educational visits (7.37%);
  - 57% of York's residents have visited a museum / gallery in the last 12 months (51.5% is national average);
  - 91% of leisure visitors to York enjoy the ambience of the city;
  - 71% visited the attractions;
  - 10% took in a festival or event while in York;
  - 4% went to a cultural performance;

- 190,000 attended performances at three of York's National Portfolio Organisations (NPO)<sup>1</sup> – York Theatre Royal, the National Centre for Early Music and the Pilot Theatre Company;
- 50.3% of adults in York attended / participated in an arts event / activity at least three times in the last 12 months (national average 43.8%);
- 77% of visitors return to York;
- Annual investment in York Theatre Royal, the National Centre for Early Music and the Pilot Theatre Company is £5,092,608 of which 57% is earned income, 8% is private giving and 37% is public subsidies;
- 71% of York residents say that cultural opportunities are important in making somewhere a good place to live;
- York's cultural, sporting and recreational economy is annually worth £75,092,608;
- £84.80 is the average spend per staying visitor per day;
- £8.81 is the median hourly wage for someone working in arts, entertainment or recreation in York (compared to £8.50 in the retail sector, which employs more people than any other sector in York);
- Across 21 attractions there are estimated to be 2,100 volunteers in the tourism sector in York;
- There were 1,700 volunteers in the 2012 Mystery Plays and more than 700 in both Blood and Chocolate in 2013 and Fog and Falling Snow in 2015;
- There were 1,483 full time equivalent places on further / higher education courses relating to culture in York's universities, 677 of the students graduated;
- 412 businesses in heritage, creative industries and art sub sectors (6,489 York businesses = 6.4%)
- 3,200 jobs in heritage, creative industries and arts sub sector (101,300 total employee jobs = 3.2%).
- There are more than 2,000,000 visitors to [visityork.org](http://visityork.org) annually;
- 500,000 visitors a year use the Visitor Information Centre.

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<sup>1</sup> Prior to June 2017 there were five NPOs based in the city. In addition to York Theatre Royal, the National Centre for Early Music and the Pilot Theatre Company, the city is the headquarters of the National Rural Touring Forum and J-Night, one of the leading producers of world jazz in the North of England. In June 2017 York Museum Trust was added to the list of National Portfolio Organisations.



23. MIY considers its relationship with Welcome to Yorkshire to be sensible without being too close. MIY co-exists with tourism bodies such as Visit Britain, Visit England and Welcome to Yorkshire although they all operate at different levels. Welcome to Yorkshire do big events to get people to Yorkshire, MIY's job is to attract them to York but it does all it can to work with other tourism bodies, recognising it is in everybody's interest to have good working relationships and to collaborate.
24. Make it York it responsible for the city's festival programme, which it has refreshed for 2018 to include:
- York being a cycle hub for the Tour de Yorkshire;
  - 'Bloom', a horticulture festival celebrating 250 year of York Florists;
  - The Great Yorkshire Fringe;
  - A pop-up Globe Theatre which for two months will present the opportunity for Shakespeare's plays to be performed in the city in a full-scale working replica of the Elizabethan playhouse;
  - The Wagon Plays;
  - Mediale (see paragraph 14 above)
25. Issues Raised by Make it York
- In terms of economic strategy for the city, tourism and culture do not feature that strongly even though they are important sectors which promote the city as a good place to live.
  - One of the weaknesses of the city's cultural offer is confusion - if the Cultural Leaders' Group can work as a cohesive unit signed up to a cultural strategy, the work of MIY would be much easier.
  - If there was a cultural strategy the city would stand a much better chance of gaining additional funding - at present when organisations bid for money from the Arts Council they make their applications themselves. They do not wait to discover if other city organisations are making similar bids.
  - At present the city is on a treadmill of doing the same festivals every year and it is important to get fresh events on the agenda.
  - MIY is trying to organise ambitious events within an infrastructure that needs attention and in small spaces that are not suitable - There are difficulties around the public realm in the city centre and the poor physical state of some areas, particularly around pavements. It is important that the city takes an overview of its performance space, whether this is developed at Castle Gateway or York Central.

- Way-finding is an issue in the city and more space needs to be freed up if visitor numbers are to increase - MIY is keen to promote the idea of trails in order to guide visitors to different locations; an ice trail at Christmas featuring 40 venues across the city; a ghost trail; a chocolate trail and an Advent calendar trail. It is also keen to promote the idea of quarters within the city to encourage people to different places with each quarter being a destination in its own right. However, there is no quick fix for the way-finding issue despite the increase in digital and mobile technology and the growing use of apps.
- One of the city's biggest challenges is anti-social behaviour. MIY gets more feedback about incidents of ASB on Saturday nights than it does anything else. York would welcome well behaved hen and stag parties but this is not the reality and these create a clash of culture. MIY has noted a decrease in footfall in the city centre on Saturdays and an increase in footfall on Sundays as many residents boycott Saturday visits to the city centre.
- CYC could enter into a cultural partnership with the youth of the city - A cultural initiative could be created to give every child in York a cultural passport, to encourage them to walk the Walls and visit the Minster and museums to help them learn to appreciate the heritage and cultural assets available within their own city.

26. In July 2017 the Task Group met **Welcome to Yorkshire's (WTY)** area director for North Yorkshire & York.

*Welcome to Yorkshire is the official tourism agency for the traditional county of Yorkshire (the UK's largest county), promoting Yorkshire tourism both nationally and internationally. It was formerly known as the Yorkshire Tourist Board until 2009, when it underwent a rebranding: a key component of which is its website. It has received international recognition for its work on marketing campaigns and continues to work on initiatives with cultural partners across the region. The stated aim of the organisation is: 'to grow the county's visitor economy'.*

27. In many ways the Yorkshire region has a similar problem to York in that it has too much to offer and the challenge is one of focus. To achieve the best results WTY has adopted a themed approach – coast, country and heritage. But the priority is to get people to Yorkshire and they can then concentrate on the sectors they are interested in.

28. WTY accepts York is a key brand within Yorkshire and wants to engage more with York and act as a medium to promote and market York's key areas. If the city has something it wants to push then WTY can showcase that as part of its overall offer.
29. WTY holds quarterly meetings with MIY to talk about key areas and meetings take place at various levels to make sure York is fully represented.
30. Issues Identified by WTY
  - The relationship between York and Welcome to Yorkshire is not what it was.
  - York is nationally and internationally renowned but it cannot afford to rest on its laurels and will have to be careful not to fall behind as other areas in the country are promoting extensively. There appears to be competition, rather than collaboration, between Visit York public relations and their WTY counterparts. At present there is not a connection. WTY and MIY need to complement each other - it would be a plus if WTY helped with marketing and promotion as it can spread the brand further.
  - York needs to increase its awareness about new markets - It is important to make sure York is and remains, a key player.
  - Businesses want to see a strong Yorkshire brand through marketing and promotions, by raising the region's profile and sharing assets, while at the same time retaining their individual identities.
  - While the council no longer has the largesse of funding it once had there is still a key role it can play. A strengthening of the partnership with WTY can help because partnership working can help deliver outcomes individual organisations find it difficult to achieve themselves because of lack of funding.
31. In late January the Task Group met with the Regional Director of the **Arts Council** as they were keen to explore the impact that CYC's decision to reduce its contribution to the city's cultural offer has had when the Arts Council are determining funding applications.

*The Arts Council champions, develops and invests in artistic and cultural experiences that enrich people's lives. They support activities across the arts, museums and libraries – from theatre to digital art, reading to dance, music to literature, and crafts to collections. Between 2015 and 2018, they will invest £1.1 billion of public money from government and an estimated £700 million*

*from the National Lottery to help create art and culture experiences for everyone, everywhere.*

32. The Arts Council supports cities which are themselves investing in arts and culture. Historically, the amount of funding the Arts Council granted was dependent on a city's ambition and commitment, the match funding it was prepared to put forward and the quality of its bid. However, the number of local authorities' completely withdrawing funding is increasing due to reducing Local Authority budgets. The Arts Council recognises that this is likely to lead to closures as it cannot meet the funding gap, and it is having to reconsider how it judges a Local Authority's ambition and commitment.
33. In York there is much less matched funding than in some other areas. There are also quite high levels of engagement against the national average and this reflects education, the economic situation in the area and childhood experiences. Therefore, in terms of engagement, York is not a priority. However the Arts Council still invests more funding in York than in some other places e.g. Doncaster, which is in the bottom 10% in terms of engagement. Previously it has provided:
  - Funding of £1.2m per year for YMT
  - Granted funding of £250,000 per year to the city's Music Education Hub
  - Given capital funding of £6m to YMT and York Art Gallery
  - Provided funding of more than £26.7 over the past five years, an average of £5.3m a year
34. This equates to £27 per head of population. If capital expenditure is removed (an average of £4m a year) the investment per head would be £20.41.
35. In late June 2017 the Arts Council named York Theatre Royal, Pilot Theatre, York Museums Trust and the National Centre for Early Music among 831 York National Portfolio Organisations which will share a total of £1.6 billion over four years, with museums and libraries coming into the portfolio for the first time.
36. The Arts Council funds National Portfolio Organisations for four-year periods and as a consequence, between 2018 and 2022, York Museums Trust will receive a total investment of £6,275,928; York Theatre Royal a total of £2,349,016; The National Centre for Early Music – £1,081,868;

Pilot Theatre – £1,318,880; National Rural Touring Forum – £346,332 and J-Night – £274,996 over the same period.

### 37. Issues Raised by the Arts Council

- The speed at which CYC has reorganised its funding for some cultural institutions e.g. York Theatre Royal has caused those institutions real concern. While the Arts Council recognises this is due to the reducing local authority budget, it feels CYC has not paid sufficient regard to the impact that this has had on those institutions.
- The impact of culture on quality of life cannot be disaggregated and is a factor that has to be recognised - The Arts Council referenced a major company in Huddersfield that had relocated from the town as it did not believe that there was a sufficient cultural offer to attract good staff.
- It was important for York not to be complacent because of its historical offer. The Arts Council gave Venice and Amsterdam as examples. Venice has chosen to hold a number of major international festivals throughout the year even though it has much to offer in terms of history and environment. Amsterdam held a Light Festival from 26 November 2015 to 17 January 2016 attracting 850k visitors. This was driven by its Chamber of Commerce to increase hotel bed night occupancy during the quieter winter months.
- Much more could be made of the Illuminating York event. The budget for Illuminating York has remained static and while the quality has gone up, the critical mass has gone down spread thinly over many more high-quality destination points than in other cities.
- Other cities have been successful in securing private investment and local businesses have been supportive, recognising its benefits for their city and its reputation. York could seek the same.
- While the intentions of setting up Make It York were good and it was important to look at new models of working, it has been seen by some as an abdication of ambition and responsibility for culture, by CYC.
- Its relationship with MIY has been 'rough' in terms of funding, with the exception of National Portfolio Organisations listed above.

### 38. In summary, the Arts Council suggested that York needs to have:

- i. Real aspirations around culture and what it can do for the city, not just economically but educationally and socially.

- ii. A much clearer strategy about where it wishes to focus.
- iii. An understanding of CYC's role, and the part that it can play in investment in arts and culture.

## Business View

39. In March 2017 the Task Group met with the Chairs of **York BID** and **Indie York** to gain further knowledge of the impact of the arts and culture sectors from a business perspective.

*York BID is a business-led partnership which aims to deliver improvements to the centre of York. It was voted in by 76% of businesses in the BID area who pay a levy towards improving the centre of York. It is not a local authority led scheme and its programmes are in addition to the services provided by CYC. Key benefits of the BID are that it gives businesses a voice to shape the environment around them and provides opportunity for continued investment in the city centre.*

40. The BID has used some of its own funding for its Winter Lights project which saw the city wall bars at Micklegate, Monkbar, Walmgate and Bootham lit up from December 2016 to February 2017. As it proved so successful it is to be repeated and expanded for 2017-18.

### 41. Issues Raised by BID

- BID have some anxiety over the role of MIY - MIY should develop a narrative about what York is, and have a role to play in terms of:
  - Co-ordinating and promoting events - there has been a tendency to view events on an ad hoc basis rather than as a collective enterprise.
  - Collaboration between business and event organisers - there has been some good examples of this so far but not enough e.g. 'Vespertine' informal links were made between businesses and the event organiser which demonstrated a willingness to co-operate, and 'Illuminate York' which lit up York Minister, marrying cutting-edge technology and history - It is important that the city is both cutting edge and contemporary.
- The city centre would benefit more if arts were held in the public realm rather than in venues such as the theatre and museums - Holding events in locations such as Parliament Street made them visible rather than being seen as a niche activity. It was noted that the

Shambles Market is beginning to do this but use of that particular space is limited due to the electricity supply being insufficient.

- The number of visitors to York puts pressure on the city centre and a maintenance programme for public realm in York city centre is important for the long-term future of some outdoor events. For example, the state of the paving in Parliament Street is poor, putting at risk current major events such as the Food Festival and the Great Yorkshire Fringe because there is a danger they cannot be delivered in a safe environment.
- In regard to the number of festivals in the city, the BID Chair stated that there are key festivals which bring greater benefits to the city e.g. the Food Festival in Parliament Street, which generates a £1m income, and there are others of more local interest to residents e.g. those arranged by retailers in Fossgate.
- It is essential the visitor experience is joined up. It is difficult to find your way round York, and there are problems with signage and way-finding. The BID is trying to formulate an approach to these problems to promote particular events.

*Indie York was formed, with the support of York BID, in the aftermath of the Boxing Day floods of 2015. It was officially launched in November 2016 to link and bring together independent businesses in the city.*

42. Because of the historic nature of the city there are lots of small properties which are better suited to being used by small independents, and this has led to a strong independent business scene. As many visitors come to York for its independents, as come for the Walls and the Minster.
43. Indie York brings together those independent businesses in one guide, available both online and in printed form. The map aims to signpost individual companies and independent clusters such as Fossgate, Walmgate, the Minster Quarter, Micklegate, The Shambles, Shambles Market and Gillygate. This could be extended in the future to include art and culture attractions, as events are important in attracting footfall.
44. Issues Raised by Indie York
  - York is being held back partly due to complacency and partly due to lack of nerve and confidence.
  - York needs a more contemporary view of the arts - It is a weakness that there is not more contemporary or cutting-edge art, and many

young, talented artists are leaving the city because there is nowhere for them to express their talents.

### Creative Industries

45. Creative Industry is the fastest growing business sector in York with more than 250 creative companies employing 4,500 people. Below are the Business Register & Employment Survey (BRES) figures for 2015 and 2016. The 2016 figures now include solely PAYE based businesses with employment counts of less than 20. This improvement in coverage is estimated to have increased the national business survey population by 95k businesses between December 2015 and January 2016 and is reflected in the new BRES 2016 figures for York below. The creative industry categories listed are based on the Department of Culture, Media and Sports definition.

<b>Creative Industries</b>	<b>Number of Jobs 2015</b>	<b>Number of Jobs 2016</b>
Manufacture of jewellery and related articles	10	0
Book publishing	0	10
Publishing of directories and mailing lists	0	0
Publishing of newspapers	50	100
Publishing of journals and periodicals	10	40
Other publishing activities	5	45
Publishing of computer games	0	0
Other software publishing	10	75
Motion picture, video and television programme production activities	25	175
Motion picture, video and television programme post-production activities	0	0
Motion picture, video and television programme distribution activities	0	10
Motion picture projection activities	75	125
Sound recording and music publishing activities	5	20
Radio broadcasting	10	50
Television programming and broadcasting activities	0	0
Computer programming activities	225	350
Computer consultancy activities	1250	1500
Public relations and communication activities	10	15
Architectural activities	300	400



Advertising agencies	500	250
Media representation	150	20
Specialised design activities	125	175
Photographic activities	30	40
Translation and interpretation activities	35	15
Cultural education	0	10
Performing arts	250	350
Support activities to performing arts	10	20
Artistic creation	75	40
Operation of arts facilities	0	0
Library and archive activities	10	100
Museum activities	400	350
<b>Total</b>	<b>3500</b>	<b>4500</b>

46. More than £100 million has been invested in media arts facilities and resources to support the sector by York's two universities, resulting in the new Department of Theatre, Film and TV on the University of York Campus. In addition, the University of York launched their Digital Creativity Labs (DC Labs) in April 2016 – a major £18 million initiative for innovative research in the convergent area of digital and creative technologies.
47. Figures used in the development of York's Economic Strategy launched in July 2016, show that:
- According to Business Register and Employment Survey (BRES) data from 2014, 3% of York's population were employed in the creative, digital and media sectors. This accounted for around 2,470 people;
  - This sector has higher wages than the national average, typically over £15 per hour;
  - The creative, digital and media sectors make up 8% of York's Gross Value Added (GVA) ;
  - York's digital, creative and media sector (information & communication) is forecast to grow by over 20% during the five year period of the Economic Strategy;

### Cultural Providers

48. Two of York's museums, the National Railway Museum (NRM) and York Castle Museum, are rated among the best cultural attractions in the

country, with the NRM featuring in Trip Advisor's top ten museums for 2017.

49. In early November 2016 the Task Group met with the Chief Executive of **York Museums Trust (YMT)**, which runs York Art Gallery, York Castle Museum, Yorkshire Museum, St Mary's and the Museum Gardens.
50. YMT employs about 100 FTE staff at any one time and all staff are paid at least the Living Wage. YMT uses its assets to enable significant partnership events that bring people and their spending power to the city. In 2015 the impact of YMT's spend was more than £13m, and their impact on the tourist economy was worth more than £15m. Statistics show that 70% of visitors to York Art Gallery come from more than 20 miles away, 1.7m people a year use Museum Gardens, which has won a Yorkshire in Bloom award four years running, and the 2nd Eboracum Roman Festival based in the Museum Gardens was attended by 30,000 people, many of whom came to York specifically to attend the event.
51. The Museum Gardens, Art Gallery, Yorkshire and Castle Museums are all cultural attractions that impact on investment decisions. YMT plays a role in commissioning high value jobs such as designers, architects and engineers while helping develop talent through initiatives such as Aesthetica and Mediale, and by working with universities and businesses. These projects provide a safe testing ground to help develop scientific and creative talents, such as the collaboration between YMT and the University of York to create a Viking Virtual Reality environment.
52. YMT believes in strong collaboration between Arts and Culture organisations and are currently working with York Chocolate Story and York Cocoa House on a project for the Castle Museum.
53. Issues Raised by YMT
  - The city should improve its approach to unlocking funds through strong partnership working and showing the value it places on culture.
  - One of the challenges in York is property prices. The use of heritage buildings for businesses rather than apartments has a beneficial impact on the economy. More investment to create work space will benefit the economy, transforming heritage buildings into flats will not.
  - Major infrastructure and capital projects that create anchor attractions have been shown to support regeneration and growth.

- Whilst some festivals are known outside of the city e.g. Aesthetica Short Film Festival (for more information see paragraphs 112-113), many of them are not and do not attract the number of visitors that similar events elsewhere do. As a tool for community engagement they may be useful, but festivals that disappoint could devalue other festivals. Consideration should be given to whether it would be beneficial to hold fewer but better quality festivals.
- Make it York has an important role in terms of drawing people to the city, but because it is responsible for such a wide cross-section of organisations, it is difficult for them to be strategic.
- It is important to set the direction in order to inform decisions, so CYC should take a strategic role and decide what the city should be like.
- Consideration should be given to establishing two separate groups; one of which would be a broad group of representatives and another smaller group based around Arts Council funding. It would also be useful to appoint someone who can identify funding opportunities and bring a group together with the relevant skills.
- YMT views York as a low income city and believes the city is disadvantaged by the Arts Council in a number of ways i.e. the Arts Council:
  - Views York in a different way to other cities e.g. those with high unemployment.
  - Does not take account of York's 7m plus visitors each year, it only considers the size of the city's population.
  - Is concerned about the reduction in revenue funding from the Council even though they understand the reasons for this - YMT are seeking to persuade the Arts Council that the CYC contribution is reasonable.

54. The **National Railway Museum (NRM)** is part of the British Science Museums Group of National Museums and has won many accolades including the European Museum of the Year Award in 2001.
55. It is the largest museum of its type in Britain and in a typical year attracts 725k visitors - its five year average is 750k visitors while the highest annual total is just short of a million.
56. Of its visitors, 10% are international visitors, 65% are regional from Yorkshire and the Humber and 25% are from the remainder of the UK. NRM has a broader draw than many other attractions and a surprisingly

high number of visitors to York come solely to visit the NRM. The museum employs 180 individuals with a seasonal employment pattern – it needs more people during the school holidays – and operates within the Science Museum management matrix structure. Catering, security and estate management are operated by third party firms.

57. The NRM works with various organisations including Make It York, York Museums Trust and the Theatre Royal, for events such as Illuminating York and Aesthetica. It also works with Welcome to Yorkshire and hosted the launch of the 2017 Tour de Yorkshire.

58. Issues Raised by NRM

- There is a sense that there is not a strong coherent view of the cultural offer in the city, and NRM would like to see more collaboration.
- Because of the NRM's location at the rear of the railway station it gets no passing trade – people are there for a specific reason – so more needs to be done in terms of way-finding.
- The NRM also has concerns about anti-social behaviour which presents a threat to the general ambience of the museum.

59. In late November 2016 the Task Group met with the chief executive of **York Archaeology Trust (YAT)**, whose portfolio includes city attractions such as the Jorvik Viking Centre, York DIG based in St Saviour's Church, Barley Hall, the Richard III Experience at Monk Bar and the Henry VII Experience at Micklegate Bar.

*YAT was set up in 1972 to help preserve the vast collection of archaeological deposits in response to threats posed to the city's archaeological heritage at the time. Today, most archaeology happens as a result of developments and the Trust works with developers on the cultural impact of these developments.*

60. YAT employs around 200 people across the Trust with some 110/120 being employed in York itself. The Jorvik Viking Centre attracts around 400k visitors a year with the combined portfolio attracting around 500k visitors a year. The Trust also runs the annual Viking Festival, Europe's largest Viking festival, which attracts an estimated 40k visitors to the city.
61. To extend the scope and reach of its activities into Yorkshire, YAT merged with the Sheffield archaeological unit, ArcHeritage, and in 2011 the Trust became even larger with the inclusion of Northlight Heritage in Glasgow and Trent & Peak Archaeology in Nottingham under its ownership, allowing it to spread its expertise across Northern Britain.

62. The Jorvik Viking Centre came into being as a result of a major development in Coppergate which gave archaeologists the opportunity to excavate an area of 1,000 square metres through 2,000 years of history. The Jorvik Centre is located on the site of the Coppergate dig.
63. YAT sees York as an extraordinary example of a city with a rich history that is also modern and vibrant with a vision for the future. As such, the Trust is not about stopping change, it is about managing change. The Trust is happy to collaborate with other organisations and this was reciprocated by other attractions such as the Minster, YMT and the Opera House who all offered their help after the Jorvik Centre suffered badly in the Christmas 2015 floods.
64. To help take things forward YAT is looking for further local authority support on projects that will be favourable for the city. For example, the challenge of trying to understand and uncover the city's Roman history - York's international status is built on its Roman foundations and it is believed the city walls stand on the original Roman walls, although this has not been tested for a long time. A project to raise the profile of York's Roman past could have huge benefits for the city. YAT considers it unlikely that a city in which Constantine the Great was acclaimed emperor of the Roman Empire in 306AD would not have had a major palace somewhere within its boundaries, although any remains will be around nine metres below the current ground level.
65. Work to redevelop the city's Castle Gateway could also open up exciting possibilities as the banks of the Foss would have been used by the Vikings and would have been an international gateway during York's Viking era.
66. Issues Raised by YAT
  - The past is a huge enabler of the future and York is a world-class archaeological city, so it should use this as a driver for economic development.
  - Collaboration and joint promotion is key if the city is to continue to flourish as a destination. For example, YAT decided to promote the attractions at two bars – the Richard III Experience at Monk Bar and the Henry VII Experience at Micklegate Bar – on one ticket and the result was that footfall at Micklegate Bar increased enormously.
  - Instances of anti-social behaviour in the city centre, particularly at weekends, is concerning.

67. **York Theatre Royal (YTR)** was built on the site of the medieval St Leonard's Hospital and dates back to 1744, which makes it the oldest producing house outside London. Its core relationship is with the citizens of York and 70-75% of its customers are from the city. The most recent data puts YTR customer spend at £3.75m, with day and overnight visitors contributing £1m to the economy. YTR employs 91 FTE staff with 70% living in the CYC area and indirectly provides employment for an additional 21 FTE positions.
68. YTR procures as much as possible from the city area with 55% of goods and services, some £1.6m, bought locally. The cafe is stocked exclusively by suppliers in the county. Last year YTR reopened after a £6m restoration and the main contractor responsible for the redevelopment was a local company. In addition, YTR hosts theatre companies from around the UK and when they perform they live and spend money in the city. This equates to 950 nights in the city for visiting companies, bringing £800k spending into the local economy.
69. Through its work with others such as visiting theatre companies and designers, YTR has developed a creative economy in the city. Students graduating from the universities who want to stay in the city are drawn to YTR, and a number of young theatre companies have been born as a result. With the aim of making sure talented young people stay in the city, YTR has developed ways to support young companies at no cost to itself and it helps with cash flow and box office management.
70. YTR gets no revenue support from CYC and has lost discretionary rate relief.
71. Issues Raised by YTR
  - There are some dynamic places around Yorkshire, and York has to compete against them - there is a need to shift from traditional to contemporary activities to avoid the risk of complacency.
  - It is important that CYC continues to demonstrate its support of arts and culture or the city risks losing financial support from the Arts Council.
  - CYC should show it has a strategic view with regards to the city's cultural offer and should facilitate through Make It York, greater co-ordination, co-operations and collaboration in the city. The Cultural Leaders' Group should take a leading role in this.
  - Make It York should provide a co-ordinating role for joint funding bids to ensure the city makes the most of what is available.

72. The **National Centre for Early Music (NCEM)** is an educational music charity based in St Margaret's, a converted medieval church in Walmgate. The church was restored and converted in 2000, winning a variety of major conservation awards, and is promoted as a significant venue for music and creative learning, embracing over 100 folk, jazz, digital and contemporary music concerts. The opening of the NCEM has helped to transform the Walmgate area and has helped increase footfall tremendously.
73. Over a million listeners tune in to early music concerts presented by the NCEM and broadcast through BBC Radio 3 each year, and an International Young Artists Competition takes place biennially in York drawing in applications from the UK and across the world – the 2017 competition attracted groups from Belgium, Switzerland, France and the Netherlands.
74. The NCEM summer festival lasts 10 days each July and audience analysis from July 2016 showed:
- 31% were aged 55-64; 55% over 65;
  - 12% were in full-time employment; 10% self-employed; 64% retired.
  - 61% came to the festival and stayed overnight – 29% in B&B; 28% in hotels; 22% self-catering.
  - 70% said they came to the festival because of the performers/repertory
  - 69% of the 2016 audience had been before; 28% were new.
  - 36% lived locally; 13% from Leeds/Beverley; 10% North West; 5% North East & 32% from across the rest of the UK and America, Canada, Poland, Taiwan, Portugal, Slovenia, Russia, Hawaii, Norway and Australia
75. The NCEM's audience for its world, jazz, folk, contemporary programme is much more localised. It sells an average of 14k tickets for promotions annually. Through its on-going partnership with BBC Radio 3 it is helping to promote the York name across Europe. An increasing use of digital technology has enabled concerts to be streamed where appropriate and where rights allow e.g. on 21 March 2017 (the European Day of Early Music) a concert was streamed via Facebook Live which attracted 22k visitors (FB yorkearlymusic). The concert was broadcast live by BBC Radio 3 and taken by the European Broadcasting Union (based in Switzerland) for broadcast in Sweden; Spain; Romania; Czech Republic; Switzerland; Lithuania; Iceland; Denmark; Austria; Belarus and Seoul in South Korea. This attracted well over 1 million listeners.

76. Locally, in addition to using St Margaret's Church, Walmgate, the NCEM also organises events in a wide variety of other venues in the city including York Minster.
77. Issues Raised by NCEM
- While the NCEM is celebrating York internationally, it is not seen as doing so in the city itself.
  - The way the Arts Council views York - NCEM was turned down for Arts Council funding and were turned down again when they applied with the Theatre Royal.
  - In recognising the value of the Arts Council, it is important that CYC gets back to being a strategic player and does not abdicate responsibility to Make It York.
  - MIY is competing with cultural organisations for Arts Council money rather than supporting them.
  - CYC could take a more strategic overview and give a voice to the city by working with cultural organisations to celebrate and promote what the city has to offer; and to attract higher-end visitors who will come to York, spend in the city and speak of their experience when they return home.
  - Anti-social behaviour and the limitations of Park and Ride (buses not running later into the night) are making it harder to attract visitors to York.
78. In May 2017 the Task Group met the director of the **Yorkshire Air Museum**.

*The Museum sits on the site of former RAF Elvington, a World War Two airfield used extensively by Allied bomber crews during the war. It is the largest independent air museum in Britain and is the most original Second World War RAF Bomber Command station open to the public. It is also the home of the only Allied Air Forces Memorial in Europe. It operates as a registered charity and not-for-profit business and receives no state or local government funding. It attracts 100,000 visitors a year and is continually expanding, with corporate business being one of its major growth areas, involving clients such as car manufactures; Motability; City of York Council; Environment Agency; Yorkshire Water; Mercia Group; BBC Question Time; ITV Touch of Frost; Yorkshire Building Society; Barclays Bank and International Rotary.*



79. The museum has a good international reputation and profile with established branches in North America and France and is supported by over 4,000 registered "friends" across the world.
80. The aircraft museum attempted unsuccessfully to create an 'air experience' at the former Airspeed factory in Piccadilly (later Reynard's Garage) based around Amy Johnson and Neville Shute. If it had been successful, the attraction would have been the first major new tourist attraction in the city for 30 years.
81. Issues Raised by Yorkshire Air Museum
- While the museum is recognised nationally and internationally as a major national attraction, it is not necessarily recognised in York itself. And while it has good relations with City of York Council it does not have much involvement with Make It York.
  - Since the formation of Make It York communications have 'gone on the back foot' and the museum deals more with Leeds than it does with York.
  - As the tourism economy helps keep York on the map, CYC/MIY should sell the whole city instead of simply promoting city centre attractions.
  - Anti-social behaviour in the city centre is a problem for museum visitors arriving at the railway station, particularly on a weekend, and when the museum exhibits its aircraft in the city centre.
82. In April 2017 the Task Group met the Head of Events and Learning from **York Minister**, one of the finest medieval buildings in Europe.
- The site of the Minster has always been an important one for York and the remains of the basilica, the ceremonial centre of a Roman fortress, was found beneath the building. The first Christian church on the site has been dated to 627 and the first Archbishop of York was recognised by the Pope in 732. A stone Saxon church survived the Viking invasion in 866 but was ransacked by William the Conqueror's forces in 1069. William appointed his own Archbishop, Thomas, who by the end of the century had built a great Norman cathedral on the site. The present Gothic-style church was built over 250 years, between 1220 and 1472.*
83. The Chapter of York, the governing body of York Minister, has 154 FTE staff and 430 volunteers fulfilling 647 roles. In 2016 the Minister

attracted 610,000 visitors; was the 60<sup>th</sup> most visited attraction in the UK and the 4<sup>th</sup> most visited cathedral in the country.

84. The Minster is not funded by the Department for Culture, Media and Sport (DCMS) and all income is generated by the Minster itself. However, it received a £10.5m grant from the Heritage Lottery Fund (HLF) as part of a major £20m restoration and conservation project on the Minster's East Front housing the Great East Window, which also helped develop new visitor attractions including the Minster Undercroft, which allows visitors to explore 2000 years of history at the cathedral site from its Roman past to present day. The HLF funding was matched by fundraising from the York Minister Fund.
85. The Minster also received two recent grants which were not match-funded by York Minister Fund. The first of £390k from the First World War Centenary Cathedral Repairs Fund for repairs to the Camera Cantorum stonework and roof. The second of £150k from the Art Council's Museums Resilience Fund to develop the Minster's Historic Collection housed in the Old Palace in Dean's Park, which includes, books, silver, textiles and glass covering more than 2000 years of life at the Minster and in the city of York. The Minster was eligible for Art Council funding because it is the only cathedral in the country with an Accredited Museum status.
86. The Minster has good relations with Make It York and the Theatre Royal manages the Minster box office. The marketing department worked closely with Visit York and York Mystery Plays Supporters Trust when the event was held in the Minster, and both the interior and exterior of the cathedral have been a major focus of Illuminating York.
87. Looking to the future the Minster wants to be involved with Mediale (see paragraphs 114-116), and in 2018 will host an international stone festival featuring 60-80 stonemasons from throughout Europe.
88. Issues Raised by the Chapter of York
  - One of the challenges for the Minster is engaging with the community - they want to more people to come into the building and they want them to feel comfortable with the space.

## **Church and Faith Communities**

89. Task Group member Cllr Cullwick produced a paper on the contribution of churches and faith communities to the city's cultural offer and its

economy. The paper focused on the contribution of churches and faith communities in the city centre, but recognised the not insignificant contribution they make in the suburbs and outskirts of York.

90. The paper considered the contribution of churches and faith communities to the economy of the city under two headings:

91. Cultural Attractions

The Minster may be the jewel in the crown of York's tourism offer, but there are other ecclesiastical jewels and hidden gems offering fine examples of architecture and craftsmanship, with a large number of listed buildings, many Grade 1. Some are primarily operated as visitor attractions such as Holy Trinity Goodramgate and the ruins of St Mary's in Museum Gardens, but others play their part in the York visitor experience whilst thriving as places of worship. The Monks of Micklegate exhibition in Holy Trinity Micklegate (the traditional starting point of the York Mystery Plays), the Bar Convent Museum on Blossom Street and the Shrine of Margaret Clitherow in the Shambles to name but three.

92. There are many medieval churches in the city centre of note that are open throughout the week and footfall is constant e.g.:

- All Saints North Street famed for its wealth of 14th century glass
- St Michael le Belfrey where Guy Fawkes was baptised.
- All Saints Pavement the Civic and Guild Church famed for its lantern tower and the burial place of 34 Lord Mayors
- St Martin Cum Gregory, the Stained Glass Centre
- St Cuthbert's in Peaseholme possibly predating the Minster
- St Helens opposite the Mansion House
- St Martins by City Screen, bombed in WW2 and only partially restored, stands as a symbol of peace and reconciliation.
- Unitarian Chapel (c1692) in St Saviourgate grade 2 listed and first two storey brick building in city.

93. As businesses and employers:

The church and faith communities are significant in terms of the employment opportunities they give rise to ranging from those directly employed by their communities; those employed in maintaining and managing church buildings i.e. stone masons, glaziers, electricians, joiners etc and administrators, cleaners, curators, youth workers, musicians, actors, counsellors and project workers etc.

94. Historically York has benefitted from a close link between faith and business, along with education and health care. It is worth noting their significant contributions to the city e.g. Rowntrees (Quaker), York St John University (CoE) and Retreat Hospital (Quaker).
95. Today the church still represents significant business interests. For example, since 1989 St Michael's Spurriergate has operated as a fair trade café, shop and counselling centre employing both paid and volunteer staff and operating as a venue for a wide range of social and cultural activities. St Sampson's similarly operates as a venue for the over 60s.
96. Other churches operate city centre businesses such as the café in Walmgate Bar operated by Calvary Chapel or the Bar Convent with its retail, restaurant, bed and breakfast and conference centre in addition to the museum and religious community. The Salvation Army Citadel on Gillygate is now the base of York City Church from where it seeks to serve the city e.g. food bank point. Even where premises become surplus to requirements they are often utilised for other purposes. In some cases buildings are leased for commercial ventures such as Biltmore and Oscars in Swinegate (owned by Elim).
97. Parts of buildings might be used for other purposes such as the John Cooper Theatre at Trinity Methodist Church or the office space released at Central Methodist and St Columba's Priory Street.
98. There are also examples of churches and faith based charities taking on buildings previously used for other purposes. Riding Lights Theatre Company created the Friargate Theatre which was formerly the wax museum. Spurriergate operates several charities from its adjacent building including its counselling centre.
99. Alongside church run businesses there are significant numbers employed by faith based organisations in the third sector, such as housing charities (e.g. Restore), work with rough sleepers (e.g. Carecent, Big Breakfast), schools workers, medical charities (e.g. Integretas) and co-ordinators of volunteers in a range of projects from street angels to food banks to charity shops. Full and part time posts in such projects are measured in the hundreds and high-quality volunteer posts in the thousands.

100. There are also many examples of the church engaged with business through chaplaincy, job clubs, rehabilitation placements with offenders and work experience placements with schools and colleges.

101. Issues Raised

- The York City Centre Churches app could be better integrated with other visitor marketing tools.
- Many of the city centre churches play a part in attracting footfall, which could be used to promote parts of the city centre considered in need of new life. For example, in promoting the regeneration of Micklegate the proximity of two museums (Holy Trinity and the Bar Convent) to the Micklegate Bar Museum could be exploited much more.
- The use of church buildings for cultural events could be better co-ordinated and exploited.

### **Ancestral Tourism**

102. In May 2017 the Task Group met the Keeper of Archives from Borthwick Institute for Archives, at the University of York.

*The Institute is home to many of Yorkshire's archives including church records going back to medieval times, wills and family records. It is part of Archives for Yorkshire which, along with The National Archives, launched a project involving local authority archive services and the National Railway Museum to promote Ancestral Tourism. Its aim is to encourage visitors, particularly ex-pats, to visit Yorkshire and retrace their family history. This ties in with the family history industry which has grown tremendously over the past 15 years or so, coinciding with the rise of the internet and online sites such as 'FindMyPast' and television programmes such as 'Who Do You Think You Are?'.*

103. The internet had changed the way people approach family history. They want more than a simple family tree and are much more interested in who their ancestors were. They now want to visit places where their ancestors once lived and worked, walk the streets they once walked and learn why an ancestor went to a work house or became a merchant tailor. The archives are not simply looking after documents, but the life stories of people who are represented in those documents which present the opportunity for people to find out who their ancestors were.

104. Scotland has already made a big push to develop the business of ancestral tourism which experts say is worth tens of millions of pounds a

year to the economy. It is estimated there are 50 million people worldwide for whom Scotland represents a place of origin. According to Visit Scotland, in 2012 visitors whose ancestors lived in Scotland included 113k from Canada and 59k from the United States, worth £106m and £69m respectively. Of these 36K from Canada and 11k from the United States carried out ancestral research during their trip. When asked about their reasons for taking a holiday in Scotland, 72% of North American visitors gave sightseeing as the primary reason, followed by genealogy/researching ancestors at 68%.

105. York is exceptional in the way it is documented and is blessed with both its history and archives and as such can create bespoke family history tours around industries such as the railways and chocolate, as both the NRM and Rowntree have extensive archives which could give York a unique selling point.

106. Issues Raised by the Borthwick Institute

- One of the challenges is making the public aware that such archives exist and that they are able to access them - Improved input and collaboration with tourism organisations will be required to overcome this. In the future, a family history week could be organised in the city but it would require the right sort of support.

107. In May 2017 the Task Group met the Chief Executive of **Explore York Libraries and Archives**,

*Explore York is an Industrial and Provident Society with charitable status, managing City of York Council's library and archive services.*

108. Explore York Archives contains thousands of documents, plans and photographs that tell the story of 800 years of York's history. Documents dating back to 1155 from City of York Council and its predecessors are held in the civic archive. The community collections include personal and family papers as well as the records of York-based charities, businesses and community groups, providing an insight into York life through the ages and allowing researchers from all over the world the opportunity to uncover the stories of the city's inhabitants and search online for their York ancestors by name, location and date.

109. York Explore has received funding from Wellcome for a 24-month project to catalogue the records of the York Poor Law Union and Workhouse, York Medical Officer of Health, Department of Health, and Department of Housing and Environmental Health. These archives, dating from the

1830s through to the early 2000s, document changing approaches to the provision of healthcare and alleviation of destitution in York over two centuries.

110. York is a developing hub for heritage tourism. Explore York gets worldwide requests for information all the time and their archives have huge tourism potential.

111. Issues Raised by York Explore

- There is a lack of available exhibition space in the city –Explore York works with other organisations that have some limited space e.g. York Museum Trust and Fairfax House.
- More should be done to discourage anti-social behaviour - Explore York is actively trying to encourage more people to use the library lawn because the more people that are around, the less anti-social behaviour there is.

### **Major Arts & Culture Related Festivals**

112. **Aesthetica Short Film Festival** is a celebration of independent short film from around the world. It supports emerging and established filmmakers by giving them a platform to showcase their work. It is a hub for the film industry and a must-attend festival in the film world calendar. For those working in the industry, it provides a chance to hear from leading international film organisations, discover emerging talent and build future collaborations.

113. The BAFTA qualifying festival returned for its sixth year in November 2016 and screened 400 films as part of its Official Selection and presented a number of Showcase Screenings from leading cultural institutions.

114. **Mediale** is the flagship initiative of York's UNESCO designation. The first is to take place in autumn 2018 and every two years thereafter. It is designed to bring the UNESCO media arts to life as a community focused event, and plans for the inaugural festival include major light commissions alongside interactive pavilions and exhibits that utilise the backdrop of the city. Its 20-day programme will be underpinned by year-long development activity with schools, communities and businesses.

115. In enabling as many people as possible to experience the transformative power of culture firsthand the aim is to build media arts into everyday life in York and to reposition the profile, ambition, excellence and impact of

the UK's programming in media arts. A commitment to the next generation of talent will be at the heart of the festival as they work alongside leading artists.

116. Above all, the proposed festival is about the city coming together to make a statement about its future. A festival of partnerships, it will take a united York to the world and bring the best of the world to York. Partnership with the UK Mediale 2018 offers the opportunity to present world-class arts programming, build relationships and international brand awareness, inspire staff and customers, and be a part of an exciting moment in York's history.
117. **Vespertine** is a two year project to stimulate the early evening economy through a series of musical performances, light projections and art installations which come to life as shops are closing. The aim is to provide more reasons for people to spend more time in the city in the early evening to get to know its culture in greater depth.
118. Launched in May 2015, the project is the result of a partnership established by York@Large, York Theatre Royal and Make It York encompassing 20 of the city's cultural organisations and managed by York Archaeological Trust. Such an event was held in October 2016, combining architecture, archaeology, technology, music and art in a virtual reality experience at the National Centre for Early Music at St Margaret's Church in Walmgate.
119. **illuminating York** is the city's biggest annual night-time festival. It enables residents and visitors to explore the city through the imagination of artists, using the medium of light in all its forms. The festival opens up some of York's most famous, most interesting and intriguing buildings by night, to experience them in a completely new way. Outdoors, buildings, spaces and places host installations using light and projection.
120. **York Viking Festival** is recognized as the largest Viking festival in Europe and it a city-wide celebration of York's Viking heritage. Taking place every February half-term, the festival programme of family-friendly events, lectures, guided walks and battle re-enactments attracts 40,000 visitors a year from across the globe.
121. The festival has its roots more than 1,000 years ago when York was under Viking rule and celebrations took place to herald the coming of spring and the end of winter hardships. These celebrations were long forgotten until the 1980s when York Archaeological Trust revived the tradition. It is now in its 32<sup>nd</sup> year and has become a firm fixture in the York calendar.



122. **York Mystery Plays** have entertained residents and visitors to the city since the 1300s. In 2016 the Mystery Plays returned to York Minster for only the second time in their near 700-year history and attracted more than 26,000 people over the course of a five-week run.
123. The plays are essentially a community production, featuring just one paid actor working alongside an army of volunteers, and previous years have seen outdoor performances on pageant wagons at various locations throughout the city.
124. **Eboracum Roman Festival** was first held in 2016 and saw more than 28,000 people attend. The second staging attracted over 30,000 visitors, many of whom came to York specifically to attend the event. Based in the York Museum Gardens, the festival included fighting displays, children's army drills, a Roman camp showing domestic Roman life, stalls selling themed goods, book readings, guest lectures, guided walks to various venues around the city, and a Roman march through the streets of the city.
125. As part of the festival the Yorkshire Museum, home to some of Britain's most important artefacts, ran various activities and workshops. The festival is due to return to York from 1-4 June 2017.
126. **York Festival of Ideas** was launched by the University of York in 2011. The Festival is a partnership between the University and cultural, social and business organisations in the city and at a national level.
127. The objective of the Festival of Ideas is to enhance York's reputation as a city of ideas and innovation by offering the highest calibre of public events to local, regional and visitor audiences and to demonstrate to the widest possible audiences the transformative power of education and ideas.

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## **Update on AVANTE (Alcohol, Violence and Night Time Economy) & Operation Erase (Saturday daytime alcohol-related disorder)**

### **Background**

1. The AVANTE Task Group was established in January 2013 and soon identified a specific trend of alcohol-related disorder on Saturday daytimes (roughly 11am – 10pm). A specific sub-group was established in June 2013 to address this particular problem and took the police operational name of Operation Erase.
2. Agencies represented across both task groups include: City of York Council, North Yorkshire Police, British Transport Police, University of York, University of York St. John, Lifeline, Street Angels, Pub Watch, Railway Station management, Train Operating Companies, Make it York and York Racecourse.

### **Progress in 2014 & 2015**

3. In February 2016 North Yorkshire Police commissioned a Crime Pattern Analysis report into alcohol-related crime, anti-social behaviour and Public, Safety and Welfare (PSW) occurrences reported in the York Cumulative Impact Zone (CIZ) area over the 2014 and 2015 periods.
4. The findings showed:
  - The number of recorded occurrences within the CIZ decreased in 2015 compared with the previous year. Alcohol-related occurrences decreased by 3% (-50 incidents).
  - ASB continued to be the most prevalent occurrence type, however a decrease was also evident and this included alcohol-related nuisance. ASB nuisance reports decreased by 11% (-172 incidents). Those reports included: begging and vagrancy, buskers, street urination, public order behaviour such as fighting or drunkenness and verbal abuse.
  - Violence-related reports increased by 18 incidents in 2015. Alcohol-related violence also increased by 18 (violent crime covers a wide spectrum from minor assaults, harassment and abuse that result in no physical harm to the victim, through to incidents of wounding and murder).
  - Theft-related offences recorded notable decreases during 2015.

- The highest concentration of offences continued to be in areas of high footfall (Coney Street, Micklegate, Blake Street, Blossom Street and Clifford Street). Those areas encompass a high concentration of licensed premises.
- The highest levels of reported occurrences were during the summer months of July and August, together with December.
- Calls for police service were at their highest on weekends; Saturday and Sunday. This was consistent across 2014 and 2015.
- Activity is highest between 1pm-6pm and midnight-4am. Those periods incorporate the traditional Night Time Economy period as well as representing the trend of visiting revellers coming into the city late morning on Saturday through into early evening when they catch the last trains home.

### **Progress in 2016**

5. Throughout 2016, both the AVANTE and ERASE groups continued to meet on a regular basis, delivering an established programme of initiatives, including:
  - Operation Safari - NYP-led violence and theft in the Night Time Economy (NTE).
  - Alcohol Diversion Programme.
  - Monitoring of the Cumulative Impact Zone (CIZ)
  - Pub Watch
  - University of York Nightsafe scheme
  - University of York St. John 'Plan Safe, Drink Safe, Home Safe' schemes.
  - Street Angels
  - River Safety – both universities offer student briefings.
6. Initiatives relating specifically to Operation Erase included:
  - A number of multi-agency Op Erase days of action were held throughout the year.
  - 'Had Enough? We Have Too' poster campaign.
  - Multi-agency Days of Action from May – September.
  - Intermittent temporary deployment of ticket barriers at York Station. Barriers are always deployed on Race days and where possible for the Days of Action.
  - Deployment of 'Dry Trains' when routes and resources allow.
  - Licensees Code of Conduct (licensees police their own venues in line with the code of conduct)
  - Increased police presence

7. Much of the low-level disorder conducted on Saturday daytimes did not fall within the realms of criminal behaviour and was therefore not recorded, but nonetheless it had an impact upon peoples' perception of the city and their feelings of safety.
8. North Yorkshire Police (NYP) conducted perception surveys with a sample of 148 city centre visitors which showed that:
  - 93% of respondents felt that York was a safe city;
  - 52% felt that York was not family friendly on a Saturday afternoon;
  - 50% felt that partner agencies were working well together to make York safe on Saturdays and;
  - 94% felt that seeing a police presence in the city made them feel safer.
9. Anecdotally both the NYP and BTP felt that things were improving. Saturday day-time problems had initially focussed around visitors from the North-East, but both police forces confirmed that this had been resolved through targeted campaigns and initiatives. Similar work was then undertaken to focus on visitors from South Yorkshire and improvements were made. Implementation of the temporary ticket barriers deterred people travelling without a ticket and provided a valuable opportunity for engagement with people as they queued at the barrier. As a result, BTP experienced a 'marked decrease' in crimes and arrests on a Saturday.
10. Recognising the importance of continued focus on those issues, both task groups continued to meet, and in October 2016 additional city centre patrolling resources were introduced in the form of CYC Neighbourhood Enforcement Officers (NEOs) and BID Rangers. The BID Rangers were deployed both Friday and Saturday evenings until midnight and the NEOs took part in the Days of Action. In addition, CYC looked to recruit two full-time Licensing Enforcement Officers who would work evenings and weekends and whose duties would include visits to licensed premises to ensure they were complying with the Licensing Act 2003 and any additional licence conditions.

### **Progress in 2017**

11. Work from the previous years has continued:
  - A River Safety Task Group meets on a quarterly basis and is chaired by North Yorkshire Fire and Rescue.

- A number of multi-agency Op Erase days of action have been held throughout the year.
  - Operation Erase (Saturday daytime ASB) and Operation Safari (violent crime in the NTE) multi-agency task groups continue to meet quarterly.
  - In terms of accountability, both of those task groups feed into an overarching strategic group chaired by Superintendant Adam Thomson (York and Selby Commander) and attended by Cllrs Lisle and Looker). Both contribute to the 'Keeping the City Centre Safer' priority within the Community Safety Plan. Superintendant Thomson is the lead for this priority and reports progress to the Safer York Partnership Board.
  - Licensees are now using the SentrySIS intranet system to share real-time information and intelligence on incidents in the night-time economy. Partner agencies are also signed up to SentrySIS so they can also use the system to post messages and alerts.
  - CYC and NYP licensing are holding meetings with York licensees to review and refresh their Code of Conduct, and to discuss the benefits of SentrySIS and how it can be used most effectively.
  - The 'Had Enough? We Have Too' campaign is to be re-launched for next season. The Safer York Partnership is funding a redesign of the poster and the campaign will be promoted by British Transport Police along the rail network.
  - The railway station continues to deploy the ticket barrier on race days and other key dates when resources allow.
  - Police continue to allocate resources to both priorities and will also be deploying a number of Special Constables over the coming months.
  - The University of York continues to run the Nightsafe campaign and are in discussions to extend this to the University of York St. John.
12. Following the introduction of a new approach in December 2016 to joint working re street urination, 23 people have been prosecuted. NYP provide the witness statement(s), the Neighbourhood Enforcement officers put the case files together and CYC's legal team present the cases in court. NYP have also deployed a cleansing van from the BID, and people who have urinated but made some effort to do this discreetly, are requested to clean up after themselves.
  13. The latest crime figures show reports of crime and ASB are down compared to the same time last year with less calls for service between 9am and 9pm on Saturdays.
  14. A review of OP ERASE is currently underway to reflect on what has previously been tried, what has worked well and what could be done

differently, and the tactical options. In addition, NYP and CYC plan to hold a Licensee meeting, at which the use of SentrySIS will be promoted and a review of the code of conduct will be completed.

15. In 2017 Perception Surveys have again been carried out by the Police and York Bid with residents, businesses and visitors, and the results compared to last years – see below:

Resident Survey (sample size: 27)

Do you view York as a safe city? – Yes = 81%

Do you believe York is family-friendly on a Saturday? Yes = 78%

Would you recommend visiting York to your family and friends on a Saturday? – Yes = 78%

Do you feel York has an alcohol-related ASB problem on a Saturday? Yes = 74%

Do you feel that partner agencies are working together successfully to make York safe on a Saturday? Yes = 70%

Business Survey (sample size: 109)

Do you believe York is a safe city? – Yes = 83%

Do you believe York is family-friendly on a Saturday. Yes = 39%

Do you feel York has an alcohol-related ASB problem on a Saturday? – Yes = 80%

Does ASB affect your business? – Yes = 47%

Do you feel partner agencies are working together successfully to make York safe on a Saturday? – Yes = 79%

Visitor Survey

Do you believe York is a safe city? –

Do you believe York is family-friendly on a Saturday? –

Do you feel York has an alcohol-related ASB problem on a Saturday? –

Does ASB affect your business? –

Do you feel partner agencies are working together successfully to make York safe on a Saturday? –

16. The results are very much the same as previous years with local businesses and residents appearing to indicate that York is a problem location for alcohol related crime and ASB, but visitors stating that they do not see a problem.

16. Again, this was not a detailed survey but it gives a good indication of the mixed public perception of York – the headlines that have appeared in the papers previously, appear to have stuck with some residents regarding York having an ASB problem.
17. What is true is that York is a very safe city that attracts people because it is so safe. These people choose to drink as is the culture change of daytime drinking. The shops are located close to the pubs and hence the two do not mix well. The CIZ statistics show that ASB and violent crime is reducing in the city centre so it suggests the work of the AVANTE group and Operation ERASE are having a positive impact. NYP continue to work to combat those who come to drink in the city in large groups and work is continuing with the partners, particularly the licensees who along with the Police play a major part in managing those visiting the city. A positive media strategy is also required so that good messages can be delivered well through the media.