
Economy & Place Policy Development Committee 27 September 2017

Information Gathered by the Arts and Culture Scrutiny
Review Task Group

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

Summary

1. This annex provides the Economy & Place Policy Development Committee with all the information gathered by the Task Group set up to examine the Impact of the Arts and Culture Sectors on the Economy of York.

Background

2. Since the remit for the review into the impact of the arts and culture sectors on the economy of York was agreed by the former Economic Development and Transport Policy & Scrutiny Committee (EDAT) in September 2016 the Task Group set up to carry out this work has gathered information from numerous city and regional organisations to enable them to make their draft recommendations in the Draft Final Report.
3. The remit was:

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.
4. To gather evidence for the review the Task Group met representatives from 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.

Information gathered

5. In December 2014 York was designated as a UNESCO City of Media Arts and a member of the Creative Cities Network. Creative industries represent York's fastest growing sector and add balance to its heritage assets and identity.
6. Data collected by the Business Register and Employment Survey released in September 2016 shows that 3,100 are employed in creative industries in York – based on the department of Culture, Media and Sports definition¹ – a slight reduction on the 3,300 employed in the sector in 2014.
7. The figures do not capture the overall impact of these sectors on the local authority. For example, a proportion of the 7 million visitors to the city each year are drawn here by our museums and cultural attractions.
8. In mid-September 2016 the Task Group met with the Chairs of Make It York (MIY) and York@Large.
 - **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

¹ The Department of Culture, Media and Sports defines the creative industries sector as including advertising, architecture, design, media, IT and computer services, music and publishing.

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.

- **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 of 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.

9. York@Large has a remit which defines the cultural sector as three mutually beneficial sub-sectors – heritage, arts and creative industries.

➤ Heritage

Heritage is positioned as 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, but this is highly vulnerable to public funding cuts.

➤ Creative Industries

The city is strong in innovation and talent and has some star companies, but the sector is fragile as York lacks support for growth in a company's early stages.

10. The Task Group also learned about the newly formed 'Cultural Leaders' Group' 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 and the National Railway Museum.
11. Also included in the Cultural Leaders Group is the Guild of Media Arts which was York's first new guild in around 700 years when it was

launched in 2015 and now has more than 200 members, including media artists, the heritage sector, cultural makers and creative industries.

12. It was created to recognise and build on York's status as the first UNESCO City of Media Arts in the UK. The Guild's aim is to unlock the full benefits of UNESCO designation and to champion York's growing creative credentials, while providing a platform for members to help solve each others' problems.
13. One of the primary objectives of the Guild, working with Make It York, is Mediale, a major international biennial festival to showcase media arts. This flagship initiative of York's UNESCO designation is due to take place in autumn 2018 and every two years thereafter. 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.
14. The Task Group also noted that collaboration between arts and culture partners had led to events such as Vespertine, 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.
15. This initiative, launched in May 2015, 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.
16. 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.
17. The Task Group agreed that the city's heritage sector was a main motor for tourism and there is a need to look more at visitor enjoyment. This is being marred by the perception and issues around anti-social behaviour in the city. The Task Group noted that when there are family events in the city, such as Sky Ride, instances of anti-social behaviour were greatly reduced.

18. They agreed that the city could be more ambitious and co-ordinated in terms of its arts and cultural offer and these need to be programmed better.
19. Data produced by Make It York, 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 of event while in York;
 - 4% went to a cultural performance;
 - 190,000 attended performances at three of York's National Portfolio Organisations (NPO)² – 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%);
 - 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;
 - £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);

² 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.

- 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%).

20. Make It York also found that:

- 77% of visitors return to York;
- £84.8 is the average spend per staying visitor per day;
- There are more than 2,000,000 visitors to visityork.org annually;
- 500,000 visitors a year use the Visitor Information Centre.

Creative Industries

21. Creative Industry is the fastest growing sector in York with more than 250 creative companies employing 3,000 people. More than £100 million has been invested in media arts facilities and resources to support the sector by York's two universities, including the new Department of Theatre, Film and TV in the University of York Campus. In addition the University of York launched the 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.
22. However, figures released on 29 September 2016 show a small decline in the overall number of creative sector jobs:

Business Register and Employment Survey

Creative Industry – based on Department of Culture, Media and Sports definition

	2014	2015
Public relations and communication activities	0	0
Advertising agencies	300	500
Media representation	0	200
Architectural activities	200	300
Computer programming activities	300	200
Computer consultancy activities	1700	1200
Book publishing	0	0
Publishing of directories and mailing lists	0	0
Publishing of journals and periodicals	0	0
Other publishing activities	0	0
Publishing of computer games	0	0
Other software publishing	0	0
Specialised design activities	100	100
Photographic activities	0	0
Translation and interpretation activities	0	0
Museum activities	500	400
Motion picture, video and television programme production activities	0	0
Motion picture projection activities	100	100
Sound recording and music publishing activities	0	0
Cultural education	0	0
Support activities to performing arts	0	0
Artistic creation	100	100
Column Total	3300	3100

23. Figures used in the development of York's Economic Strategy, which was 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)³ ;
- 700 graduates per annum in York from this sector making up part of a growing network;
- York's digital, creative and media sector (information & communication) is forecast to grow by over 20% during the five year period of the plan;
- Leading facilities for film production at University of York, with over 100 graduates and postgraduates each year from leading courses.

City of York Council

24. In October 2016 the Task Group met with City of York Council's Corporate Director Children, Education and Communities, to gather information to support Objective (ii) of the review.
25. The Task Group was specifically looking at strategies that could be put in place to help develop the impact of the arts and culture sectors on the city's economy and noted that CYC once had a significant arts and culture team, but this was no longer the case. However, arrangements are in place with other organisations and it is important for CYC to have a voice to avoid a situation whereby provision was too disparate.
26. Members were aware that although it was not the Council's responsibility to provide a cultural offer, it should have an overarching brief. CYC had a role in ensuring that a more coherent approach was taken. The biggest risk would be if the Council did not continue to have an influence in the arts and culture sector – it was a pivotal interest for the city.
27. The Task Group noted that a lack of a strategy affected the ability to attract funding from organisations such as the Arts Council. When the Arts Council allocated funding it expected a financial contribution from the Council to demonstrate its commitment. The Task Group recognised

³ 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". When using the production or income approaches, the contribution to the economy of each industry or sector is measured using GVA.

that it needed to find out more about the form that this match funding might take.

28. Members agreed that the arts and culture sector was important not only for tourism and as an employer, but also in attracting jobs to the city. However, the sector in the city is “bumping along” in traditional ways and Members questioned whether York was underperforming in the arts and culture sector and agreed that the city’s aspirations and profile should be raised.
29. Initiatives such as Mediale were one of the ways in which different types of people might be attracted to the city but established events, such as the Mystery Plays, are not connected to anything else going on in the city and the Council needs to facilitate a co-ordinated, joined up approach.
30. Members considered whether it would be beneficial for a conference to be arranged to bring together those working in the arts and cultural sectors and encourage more coherent working.
31. They also considered what additional support can be given to start-up businesses in the media arts field and how media arts can be used to look at heritage in a different way. To help achieve this they agreed it would be useful to consider the city’s skills strategy.
32. The Task Group agreed on the importance of CYC making a statement of commitment to the arts and culture sector – an articulated vision to recognise its importance to the economy of the city.
33. Subsequently, on 20 December 2016, the Task Group met with the Chief Executive of City of York Council and the Assistant Director Communities and Equalities. The Task Group noted that traditionally the Council had had a defined leisure and culture function with a dedicated team delivering these services. This was no longer the case and its role was now as a participant and collaborator – influencing and linking into the networks that were in place. The Council has a service level agreement with Make it York, which is helping develop a cultural strategy for the city. This includes identifying core priorities for the city and how these can be presented to bodies such as the Arts Council. However, the Task Group recognised that heritage, culture and leisure are more complex in the modern world.
34. Members also noted that the Cultural Leaders’ Group is emerging as a vibrant leader in the cultural sector. While the cultural sector in York, as in other cities, is quite competitive, developments have been made in areas such as the sharing of data and the Council’s success in helping

make that happen is notable. However, it is not realistic for the Cultural Leaders' Group alone to set a shared vision and the Council has an important role to play. The Council provides a strategic steer for the city. It has signed up to the York Economic Strategy, of which this is a part, and can influence clear priorities. However, it is acknowledged the benefits and outcomes are difficult to measure.

35. The Task Group recognised that one of its objectives is to identify the part played by the Council in these sectors and that it has a huge role in shaping the overall vision. Members were encouraged to note that the Council is showing leadership through the design and master planning of regeneration projects and has a strong custodial role to ensure the quality of the product is not lost. Make It York has a crucial role to play in strengthening these relationships and productive talks are taking place to evolve the Council's service level agreement. When MIY was established the core message had been that York is a brand and there was a need for city organisations to show greater collaboration. The strong view now is that a key is to tie together modernity and the contemporary cultural offer with the city's heritage, as evidenced by initiatives such as UNESCO, Mediale and the development of digital arts.
36. The Chief Executive stated that she had been having discussions as to whether the city could do more to maximise the benefits of working on a regional basis to promote tourism. This could involve consideration as to how York joined up with Hull, Harrogate and other destinations and how it could benefit from major events on offer in other cities. It was noted that Leeds is bidding to be the European Capital of Culture for 2023. The Task Group agreed there is a need to be outward facing as well as remaining aware of what is happening in York.
37. The Task Group noted there was huge potential in developing the early evening economy and that there are also aspects of the city's heritage which could be better promoted including the city walls, St Leonard's Hospital, an exploration of York's Roman history and further initiatives to increase footfall on the Micklegate side of the river.
38. While tourism underpins many of the city's opportunities, driven by international and wider national visitors, York needs to extend the range of its visitor experiences. There is a worry that the city is not setting its sights high enough and that if it is not agile enough it will be left behind.
39. The Chief Executive was asked to comment on a view that had been put forward during the review that the variable quality of festivals held in the city undermined the brand. She confirmed that this was an issue that

should be considered and stated that the city could attract world class events. There were also events being held across Yorkshire in which York could play a part. It was important to look at the opportunities to be gained through the Yorkshire brand without losing York's own brand.

40. In early May 2017 the Task Group met the Executive Member for Culture, Leisure and Tourism who agreed the Council needs to give more of a strategic lead. In York the culture and heritage focus tends to lean towards tourism, which is complicated as tourism sits between economic development and culture.
41. The Task Group agreed the Council could strengthen its cultural leadership and facilitate ways of bringing various organisations together. It should also articulate what we do as a city and be clear about York's position locally, regionally and nationally.
42. In particular, York needs clarity about its role in the wider Yorkshire offer. The Council contributes both to Make It York and Welcome to Yorkshire and steps could be taken to get them to work better together. It could also look at what it wants from Make It York and give the organisation a strategic lead.
43. The Task Group recognised the Council could be more pro-active and more strategic with more clarity on what it can offer and what needs to be promoted. The arts and culture sectors are a large part of the economic offer and a driver for attracting economic investment. The city has many valuable attractions but is not making the most of many of them.

York Museums Trust

44. 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 Museum Gardens.
45. Two of York's museums, the National Railway Museum and York Castle Museum, are rated among the best cultural attractions in the country and are included in Trip Advisor's top ten museums. None of the others in the top ten are outside London.
46. However, the Task Group was informed that it was the Arts Council's view that York was not doing enough. Revenue funding was dropping, and whilst the Arts Council understood the reasons for this, there were concerns. YMT was seeking to persuade the Arts Council that the CYC

contribution was reasonable but they were concerned about the situation.

47. The Arts Council do not view York in the same way as some other cities, for example those with high unemployment. YMT is making it clear that York is, however, a low income city. The Arts Council believe that they contribute a lot in view of the size of the city's population and YMT had to make clear that the city also has over 7 million visitors. Organisations working together can unlock funds and the approach needs to show strong collaboration and that York is a city that values culture.

48. The Task Group noted:

YMT's value and impact on the economy of York

- YMT employs about 100 FTE staff at any one time and all staff are paid at least the Living Wage.
- In 2015 the impact of spend was more than £13m and YMT had an indirect impact on the local economy worth more than 40 jobs.
- 70% of visitors to York Art gallery come from more than 20 miles away, bringing spend to the city.

YMT's direct impact on the visitor economy

- In 2015 the impact on the tourist economy was worth more than £15m.
- The five significant tourist attractions run by YMT mean visitors, businesses and residents are impressed by the quality of the city.
- YMT uses its assets to enable significant partnership events that bring people to the city:
 - Illuminating York 2015 culminated in Museum gardens
 - Eboracum Roman Festival, based in Museum gardens, was attended by 28,000 people
 - Playing a full part in the UNESCO City of Media Arts Mediale.

YMY's impact on inward investment – making the city a desirable place to live

- 1.7m people a year use Museum Gardens, which have won a Yorkshire in Bloom award four years running.
- Museum Gardens, Art Gallery, Yorkshire and Castle Museums are cultural attractions that impact on investment decisions.

49. It was noted that one of the challenges in York was 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 them into flats will not.
50. The Task Group agreed that developing, shaping and retaining a knowledge base is vital for the city and this is where arts and culture play a part. Major infrastructure and capital projects that create anchor attractions have been shown to support regeneration and growth. Arts and cultural businesses, as compared to other tourism businesses, commission the creative industries such as exhibition designers, engineers, architects designers, IT and digital creative, set designers, and film producers. YMT events and commissions help develop scientific, business and creative talent.
51. By partnering with cutting edge businesses and universities, arts and culture can provide testing grounds for products and the creative environment that enables ideas to be developed for markets.
52. 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.
53. The Task Group agreed that York had been branded “City of Festivals” and questioned whether this was a good thing. The Food Festival, for example, which although popular with local residents, did not attract visitors in the way that events such as the Ludlow Food Festival achieved. It was acknowledged that the festivals may be useful as a tool for community engagement but consideration could be given as to whether it would be beneficial to hold fewer but better quality festivals. Quality control was important. Members suggested that festivals that may disappoint could devalue other festivals. It was noted that many of them were not known outside of the city, although others like Aesthetica

did bring in visitors, as did events such as the Liverpool Biennial Festival and the Manchester International Festival.

54. YMT believes in strong collaboration between Arts and Culture organisations and they were working with York Chocolate Story and York Cocoa House on a project for the Castle Museum. However, YMT considered that Make It York was so big that it was not always the appropriate forum for decision making.
55. It was noted that consideration could 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. Make it York has an important role in terms of drawing people to the city. CYC could take a strategic role and decide what the city should be like. It is important not to just “let things happen” but rather to set the direction in order to inform decisions. As such it would be useful to appoint someone who can identify funding opportunities and then is able to bring a group together with the relevant skills.

York Archaeology Trust

56. In late November 2016 the Task Group met with the chief executive of York Archaeology Trust (YAT). The YAT 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.
57. The Jorvik Viking Centre attracts around 400,000 visitors a year with the combined portfolio attracting around half-a-million visitors a year. The Trust also runs the annual Viking Festival, Europe’s largest Viking festival, which attracts an estimated 40,000 visitors to the city.
58. To extend the scope and reach of its activities into Yorkshire, the Trust 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. YAT employs around 200 people across the Trust with some 110/120 being employed in York itself.
59. The Task Group noted that while the trust 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, most

archaeology happens in relation to developments and the Trust works with developers on the cultural impact of these developments.

60. Indeed, 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.
61. The Task Group agreed that York is a world-class archaeological city and it should use this as a driver for economic development as the past is a huge enabler of the future. York is 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.
62. And while York is a flourishing heritage and destination tourism location the offer is not joined up. There could be more collaboration in promoting the city as a place of world-class importance.
63. The YAT Chief Executive stressed that the Trust is happy to collaborate with other city organisations and that was reciprocated after the Jorvik Centre suffered badly in the Christmas 2015 floods and other attractions such as the Minster, YMT and the opera house all offered their help.
64. Collaboration and joint promotion is a 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.
65. To help take things forward YAT is looking for further local authority support on projects that will be favourable for the city. At the forefront of this is the challenge of trying to understand – and uncover – the city's Roman history.
66. York's international status is build 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.
67. YAT consider 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.

68. And work to redevelop the city's Castle Gateway could 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.
69. However, YAT raised concerns about instances of anti-social behaviour in the city centre, particularly at weekends.

York Theatre Royal

70. 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.
71. At a meeting in early January 2017 the Task Group learned that YTR's core relationship is with the citizens of York and 70-75% of visitors are people from the city. The most recent data puts YTR visitor spend at £3.75m with day and overnight visitors who said YTR was the main reason for their visit contributing £1m. YTR employs 91 FTE staff with 70% living in the CYC area and provides indirectly employment for an additional 21 FTE positions.
72. 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.
73. 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 £800,000 spending into the local economy.
74. The Task Group noted that YTR has developed a creative economy in the city through working with others, such as visiting theatre companies and designers while young theatre companies have been born out of working with YTR. Students graduating from the universities who want to stay in the city are drawn to YTR. It has developed ways to support young companies at no cost to YTR and helps with cash flow and box office management with the aim of making sure talented young people stay in the city.
75. While it is accepted that York is a good city for creative businesses YTR feels, along with arts and culture colleagues, there is a need to shift from traditional to contemporary activities to avoid the risk of complacency.

There are some dynamic places around Yorkshire and York has to compete against them. The Task Group agreed that the authenticity of the city is fantastic but it has to be imaginative in using these unique settings to create memorable cultural events.

76. The Task Group noted that arts and culture expertise has largely disappeared from the council. YTR gets no revenue support from CYC and has lost discretionary rate relief. However, it is important that CYC continues to demonstrate its support of arts and culture in other ways, such as making space assets available, or risk losing financial support from the Arts Council. It could also facilitate, through Make It York, greater co-ordination, co-operations and collaboration in the city. The Cultural Leaders' Group can also take a leading role in co-ordinating activities in the city.
77. CYC should show it has a strategic view with regards to arts and culture and Make It York should be the glue that holds all this together by providing a co-ordinating role for joint funding bids and making sure we make the most of what is available.

The Guild of Media Arts

78. 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.
79. The Guild's mission is unlock the full benefits of UNESCO designation and to champion York's growing creative credentials and its stated aim is: *"To strengthen York's cultural and creative industries; to nurture the Media Arts designation by ensuring that the UNESCO obligations are met in full and to ensure all our citizens benefit from the opportunities offered by being part of the global Creative Cities Network."*
80. 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.

81. At a full meeting of the Economic Development & Transport Policy & Scrutiny Committee in January 2017 the Guild clerk and Deputy Master gave a presentation about the work of the Guild and its hopes for the future. During the course of the presentation they were asked specifically by Task Group members about the impact of the arts and culture sectors on the city's economy.
82. The Committee was told that the Guild has links with other UNESCO cities throughout Europe and this international framework provided York with the opportunity to be seen, via the Guild, as a city capable of growing the creative sector alongside its culture.
83. The Guild was described as a body 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 and includes a lot of women, although many of its members are self-employed so are not captured through PAYE data.
84. The Committee heard that 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 needs help to grow and develop. The city's universities attract incredibly talented people and the aim is to keep them in York.
85. The Guild considered at the time that the city's Local Plan is strong on heritage but less strong on culture and it wanted 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 and by being a great facilitator through developing jobs and employment opportunities and promoting the city as a brilliant place to live.
86. The Guild also feels the Council needs to 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. The Guild considers that one of the barriers to keeping young start-up businesses in the city is the ability to provide good premises with the capacity to grow and develop.

Arts Council

87. In late January the Task Group met with the Regional Director of the Arts Council and explained that one of the issues that the Task Group was keen to explore was the impact that CYC's decision to reduce its contribution to the arts and culture sector could have when the Arts Council were determining funding applications.
88. The Arts Council invests £27 per head of York's population. If capital expenditure is removed (an average of £4m a year) the investment per head is £20.41.
89. The Task Group learned that the Arts Council funded NPOs for four-year periods and had:
 - Provided funding of £1.2m per year for YMT
 - Granted funding of £250,000 per year to the Music Education Hub in the city
 - 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
90. However, the Task Group noted that the amount of funding granted by the Arts Council was dependent on the city's ambition and commitment, the match funding it was prepared to put forward and the quality of the bid. The financial contribution that the Local Authority was prepared to make to a project was one of the factors that was taken into account when bids were assessed, although other factors were also considered.
91. York has 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 places such as Doncaster, which is in the bottom 10% in terms of engagement.
92. The Task Group recognised that the speed at which CYC had reorganised funding for some institutions had caused real concerns for organisations such as York Theatre Royal. While it was recognised that this was because of the financial situation nationally, the Arts Council feels that CYC does not pay sufficient regard to the impact that this will

have on the organisations. It was also noted that funding of arts and culture is very small when compared to other areas of council funding.

93. The Arts Council has publicly stated that it will support cities which are investing in arts and culture as local authorities are bigger funders of arts and culture than the Arts Council. It is likely that instances will occur where a complete withdrawal of funding by a local authority will lead to closures as the Arts Council cannot meet the funding gap. In York there is much less matched funding than in some other areas.
94. The Arts Council agreed that impact of arts and culture on the quality of life was a factor that had to be recognised. A major company in Huddersfield had relocated from the town as it did not believe that there was a sufficient cultural offer to attract good staff. The impact of culture on the quality of life could not be disaggregated.
95. It was important for York not to be complacent because of its historical offer. Venice had recognised the need to hold a collection of major international festivals throughout the year even though it had much to offer in terms of history and environment, and the Amsterdam Light Festival, which from 26 November 2015 to 17 January 2016 attracted 850,000 visitors, had been driven by the Chamber of Commerce to increase hotel bed night occupancy during the quieter winter months.
96. In York the budget for Illuminating York had remained static and while the quality had gone up the critical mass had gone down and was spread thinly over many more high-quality destination points than in other cities. Much more could be made of this event.
97. The Arts Council stated that if CYC gave a commitment and was prepared to invest, the Arts Council would have to respond, but there has to be commitment and ambition. It was important to ensure that the city does not become complacent – it is a competitive environment and the city cannot rest on its laurels. The Task Group noted:
 - The light festival in Durham is the premier such event in the country. It has become so successful that it was now ticketed, although entry is free.
 - Attendances at events in Hull to mark its City of Culture status had already greatly exceeded expectations. The city has been successful in securing private investment and local businesses have been supportive, recognising its benefits for the city and its

reputation. Consideration could be given as to whether York could look to businesses for support and funding.

- The Bradford Literary Festival has a major private sector investor, but the entry level costs of staging a festival of this scale requires investment of at least £250,000.
- Liverpool has invested heavily in culture but there are concerns as to whether this level of investment can be maintained. A suggestion has been put forward that Liverpool could explore the introduction of a tourism tax of £1 per night hotel stay with the funding generated being spent on culture.

98. The Arts Council also stated that while the intentions of setting up Make It York had been good, and it was important to look at new models of working, it has been seen as an abdication of ambition by the local authority and its responsibility for culture. It said its relationship with MIY has been “rough” in terms of a lot of funding, with the exception of NPOs.

99. Asked what three things CYC could do to support the arts and culture sectors and their impact on the city’s economy, the Arts Council suggested:

- The city should have real aspirations around culture and what it can do for the city, not just economically but educationally and socially.
- It should have a much clearer strategy about where it wished to focus.
- There should be an understanding of CYC’s role, and the part that it could play in investment in arts and culture.

Business view

100. In March 2017 the Task Group met the Chair of York BID and the Chair of Indie York to gain further knowledge of the impact of the arts and culture sectors from 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 per cent 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 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 continues investment in the city centre.

- **Indie York** was launched in November 2016 to bring together independent businesses in the city. It notes that one of the features of York is its strong independent business scene. The historic sites, medieval street pattern in the centre and the Georgian and Victorian streets around the city give York its character and together make it a unique place to live, work and visit. With this in mind, Indie York is bringing together 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.

101. The Chair of York BID felt that more needed to be done in terms of co-ordinating and promoting events in the city and organisations needed to work more cohesively. There was anxiety over the role and function of Make It York, although he accepted MIY had not been in place very long and had inherited a number of issues which it had needed to resolve. However, he felt there is a need for MIY to develop a narrative about what York is. There has been a tendency to view events on an ad hoc basis rather than as a collective enterprise. Vespertine was an example of collaborative working between business and event organisers for which informal links has been made and demonstrated there was a willingness to co-operate.
102. Another example was when Illuminate York lit up York Minister, marrying cutting-edge technology and history. It was important that the city was both cutting edge and contemporary.
103. The BID had 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 and proved so successful it is to be repeated and expanded for 2017-18.
104. 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 was beginning to do this but, as the electricity supply was not sufficient, this limited the way in which this could be used as an events space.

105. Another concern is the state of the paving in Parliament Street which is putting at risk current major events such as the Food Festival and the Great Yorkshire Fringe because there is a danger these events cannot be delivered in a safe environment. A maintenance programme for public realm in York city centre is important for the long-term future of some outdoor events.
106. Responding to the question as to whether there were too many festivals in the city, the BID Chair stated that he would not wish to deter local events, such as those arranged by retailers in Fossgate. There were key festivals in the city and others which were of more local interest. The Foods Festival in Parliament Street, for example, brought benefits to the city and had a £1m income.
107. The number of visitors to York puts pressure on the city centre and it is essential the visitor experience is joined up. One of the issues with York is to find your way round, there are problems with signage and way-finding is difficult. The BID is trying to formulate an approach to these problems to promote particular events.
108. The Chair of Indie felt York was being held back partly due to complacency and partly due to lack of nerve and confidence. There was no longer an Arts Centre and arts and culture had now been focussed on the Theatre Royal, the museums and the Centre for Early Music. It was a weakness that there were not more contemporary or cutting-edge arts. He said there are young, talented artists in York, but many are leaving the city because there is nowhere for them to express their talents. He felt CYC needs to change its focus towards a more contemporary view of the arts.
109. Indie York was formed, with the support of York BID, in the aftermath of the Boxing Day floods of 2015 and their impact on small businesses. The aim was to link local businesses as they are a life blood of the city. Because of the historic nature of the city there are lots of small properties which are better suited to being used by small independents. He suggested that as many people come to York for its independents that come for the Walls and the Minster.
110. The map produced by Indie York was to link and signpost independent businesses, but this could be extended in the future to include art and culture attractions as events are important in attracting footfall.

York Minster

111. In April 2017 the Task Group met the Head of Events and Learning from York Minster, 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 the Roman fortress, have been found beneath the building.
112. 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.
113. The Chapter of York, the governing body of York Minster, has a FTE staff of 154 and 430 volunteers fulfilling 647 roles. In 2016 the Minister:
- Attracted 610,000 visitors;
 - Was the 60th most visited attraction in the UK;
 - Was the 4th most visited cathedral in the country.
114. 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, which houses the Great East Window, the largest single expanse of medieval stained glass in the country. The five-year project started in 2011 and in addition 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 sheer size of the Great East Window has meant the conservation and restoration of all the stained-glass could not be completed as part of the five-year project but it should be fully completed by 2018. The HLF funding was matched by fundraising from the York Minster Fund.
115. The Minster also received two recent grants which were not match-funded by York Minster Fund. The first was £390,000 from the First World War Centenary Cathedral Repairs Fund for repairs to the Camera

Cantorum stonework and roof. This work was completed in January 2017.

116. The second is a grant of £150,000 from the Art Council's Museums Resilience Fund. The Minster is eligible for the funding because it is the only cathedral in the country with an Accredited Museum status and the grant is to develop the Minster's Historic Collection. Housed in the Old Palace in Dean's Park, the Historic Collection includes, books, silver, textiles and glass covering more than 2000 years of life at the Minster and in the city of York.
117. While the Minister is an undoubted visitor attraction it has to be remembered that it is a church and church services will always override cultural events. 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 while both the interior and exterior of the cathedral have been a major focus of Illuminating York.
118. The Minster accepts that it is a great resource and one of its challenges is engaging with the community. They want to invite people into the building and feel comfortable with the space, which is why Illuminating York at the Minster was so successful. Looking to the future the Minster want to be involved with Mediale and in 2018 will host an international stone festival featuring 60-80 stonemasons from throughout Europe.

Church and Faith Communities

119. Task Group member Cllr Cullwick produced a paper on the contribution of churches and faith communities to the economy and development of York in many different ways. The paper focuses on the city centre as much of the work of the Task group focuses on the visitor economy and experience, but in the suburbs and outskirts of York the contribution of churches and faith communities is no less significant.
120. The paper considers the contribution of churches and faith communities to the economy of the city under two headings:
- As businesses and employers;
121. As visitor attractions and as part of the visitor experience of York.

122. **As businesses and employers:** As an employer the church and faith communities are significant not only with regard to those employed directly by their communities but also in the many other employment opportunities they give rise to ranging from administrators, cleaners, curators, youth workers, musicians, actors, counsellors, project workers in addition to those directly employed in maintaining and managing heritage assets – crafts including stone masons, glaziers, electricians, joiners, and many other skills.
123. Historically York has benefitted from a close link between faith and business, along with education and health care. It is worth noting the significant contributions to the city of the Rowntrees (Quaker), York St John University (CoE) and Retreat Hospital (Quaker) to name but three examples. In earlier centuries, through the Middle Ages in particular, the church would have been the main employer in the city.
124. Today the church still represents significant business interests. St Michael's Spurriergate is a case in point. Since 1989 it 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.
125. 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).
126. 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.
127. Still other church buildings have been put to different use. St Margaret's is home to the National Centre for Early Music; St Saviour's is run by the York Archaeological Trust as the DIG, St Mary's in Castlegate is in the ownership of the Museums Trust, and St John's on Bridge St, once an Arts Centre and owned by the University of York, is now a wine bar.

128. There are many other businesses operating in premises that were once churches. Examples include Zizzi on Lendal, Sports Direct in Davygate or the old fire station on Clifford Street.
129. But 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.
130. 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 (e.g. YoYo), 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.
131. 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.
132. **Visitor 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.
133. All the city centre churches are open throughout the week and footfall is constant. It would be interesting to get an accurate measure of this. The York City Centre Churches app could be better integrated with other visitor marketing tools. Of particular note are the many medieval churches including:
- 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.

134. Such places and many others are visitor attractions in their own right and play a part in attracting footfall. More could be made of this not least 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 than is the case.

135. Of course many of these venues also contribute to the cultural offer of the city centre as venues for concerts, exhibitions, gallery space and installations in addition to their normal function as places of worship. Again this is something that could be better co-ordinated and exploited.

136. In late April 2017 the Task Group met the Director of the National Centre for Early Music (NCEM) and the Director of the National Railway Museum (NRM).

National Centre for Early Music (NCEM)

137. NCEM is an educational music charity based in St Margaret's, a converted medieval church in Walmgate. The church was restored and converted into the NCEM in 2000, winning a variety of major conservation awards. The NCEM promotes St Margaret's as a significant venue for music and creative learning, embracing over 100 folk, jazz, digital and contemporary music concerts

138. The NCEM is an ambitious organisation with a clear vision for its future. 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 across the world – the 2017 competition

attracted groups from Belgium, Switzerland, France and the Netherlands as well as from the UK.

139. The NCEM summer festival lasts 10 days each July and audience analysis shows:

- 31% are aged 55-64; 55% over 65;
- 12% are in full-time employment; 10% self-employed; 64% retired.
- 61% come to the festival and stay overnight – 29% in B&B; 28% in hotels; 22% self-catering.
- Why do they come to the festival? 70% say come to the festival because of the performers/repertory
- 69% of the 2016 audience had been before; 28% were new.
- 36% live locally
- 13% from Leeds/Beverley
- 10% North West
- 5% North East
- Rest across Britain and in 2016 from America, Canada, Poland, Taiwan, Portugal, Slovenia, Russia, Hawaii, Norway and Australia
- In 2015 from America, France, Norway, Switzerland, Germany, Italy, Australia, New Zealand, the Netherlands, Thailand and Israel.

140. The NCEM's audience for its world, jazz, folk, contemporary programme is much more localised. It sells an average of 14,000 tickets for promotions annually. These figures are boosted by an on-going partnership with BBC Radio 3 and increasing use of digital technology to stream concerts were appropriate and were rights allow: On 21st March 2017 (the European Day of Early Music) the concert was streamed via Facebook Live and attracted 22,000 visitors and a world-wide conversation (FB yorkearlymusic). The concert was also 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.

141. In addition to using St Margaret's Church, Walmgate, the NCEM also organised events in a variety of other venues in the city including York Minster; St Lawrence's Church, Hull Road; St Olave's Church, Marygate; Unitarian Chapel, St Saviourgate; Lyons Concert Hall, University of York; Bedern Hall; St Michael le Belfrey, High Petergate and last year it also used All Saints, North Street; Merchant Adventurers' Hall; York Cemetery Chapel and York Guildhall.

142. The Task Group learned that the opening of the NCEM had helped to transform the entire Walmgate area and had helped increase footfall tremendously while its partnership with the BBC was promoting the York name across Europe. However, while the NCEM is celebrating York internationally it feels it is not seen as doing so in the city itself.
143. The Director was concerned about the way the Arts Council views York. They had applied for Arts Council funding and were turned down and they had applied along with the Theatre Royal and were turned down.
144. She wondered whether CYC could take a more strategic overview and give a voice to the city. In recognising the value of the Arts Council it was important that CYC gets back to being a strategic player and does not abdicate responsibility to Make It York. The Director's view is that MIY is competing with cultural organisations for Arts Council money rather than supporting them.
145. As such it is important for CYC to work with cultural organisations, to have a strategic plan and to celebrate and promote what the city has to offer to attract higher-end visitors who will come to York, spend in the city and speak of their experience when they return home.
146. Other concerns for the NCEM were anti-social behaviour and the limitations of Park and Ride as it was hard to attract people when the buses were not running later into the night.

National Railway Museum

147. 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.
148. It is the largest museum of its type in Britain and in a typical year attracts 725,000 visitors. Its five year average is 750,000 visitors while the highest total is just short of a million.
149. Of these 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.

150. The NRM works with various organisations including Make It York for events such as Illuminating York and Aesthetica, York Museums Trust and the Theatre Royal. It also works with Welcome to Yorkshire and hosted the launch of the 2017 Tour de Yorkshire.
151. However, one of the ambitions of the NRM is to see more collaboration. There is a sense that there is not a strong coherent view of the cultural offer in the city.
152. 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 can be done in terms of way-finding. And, again, the NRM has concerns about anti-social behaviour which presents a threat to the general ambience of the museum.

Ancestral Tourism

153. In May 2017 the Task Group met the Keeper of Archives at Borthwick Institute for Archives, 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.
154. The 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?
155. The Task Group learned that 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 these people were. They now want to visit places where their ancestors once lived and worked and walk the streets they once walked down 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.
156. 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.

157. The Task Group acknowledged that from an international perspective most of the ancestral tourists would be from the English speaking world, such as the United States, Canada, Australia, New Zealand and South Africa, and, in the main, these will be high-end visitors to the city staying in the more expensive hotels and eating at the more expensive restaurants. There is also the potential of attracting UK visitors and day visitors, all of which will bring money into the local economy.
158. One of the challenges is making the public aware that such archives exist and that they are able to use them. A way of overcoming this is through input and collaboration with tourism organisations. Looking to the future they would like to organise a family history week in the city but at present it is not possible to do this without the right sort of support.
159. The Task Group learned that Scotland has 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. Scotland's People runs specific projects for the Scottish diaspora, particularly from North America and Australia. It is estimated there are 50 million people worldwide for whom Scotland represents a place of origin. In 2012, according to Visit Scotland, visitors whose ancestors lived in Scotland included 113,000 from Canada and 59,000 from the United States, worth £106m and 69m respectively. Of these 36,000 from Canada and 11,000 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%.
160. For the Keeper of Archives success would mean increasing the number of ancestral tourists coming to York and spending their money here.

Explore York

161. In May 2017 the Task Group met the Chief Executive of Explore York Libraries and Archives, an Industrial and Provident Society with charitable status which manages City of York Council's library and archive services.
162. 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.

163. It 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.
164. These records provide an insight into York life through the ages and allow researchers from all over the world the opportunity to uncover the stories of the city's inhabitants and enable people to go online and search for their York ancestors by name, location and date.
165. The Task Group learned that the Past Caring project has been so successful that it is used by academics from all over the country as well as family history researchers. In addition Findmypast had digitalised one million records and these can be accessed on a 'pay per view' basis.
166. As York is a developing hub for heritage tourism Explore York gets worldwide requests for information all the time and the archives have huge tourism potential. People want to understand the social history of the time, they want to know what the city looked like and they want to walk in the footsteps of their ancestors. This has been enhanced by television programmes such as Who Do You Think You Are? which has helped encourage a whole history industry.
167. The Task group noted that York has all sorts of connections to literary history with York resident Richard Chicken believed to be the inspiration for Mr Micawber in Charles Dickens's David Copperfield, while the archives also show that the father of Guy Fawkes was once charged with not cleaning his gutter properly.
168. One problem for Explore York is the lack of availability of exhibition areas, although it does work with people who have space, such as York Museum Trust and Fairfax House.
169. And the Task Group again heard that more needs to 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 then the less anti-social behaviour there is.

Yorkshire Air Museum

170. Also in May 2017 the Task Group met the director of Yorkshire Air Museum, which sits on the site of former RAF Elvington, a World War Two airfield used extensively by Allied bomber crews during the war. It is also the home of The Allied Air Forces Memorial. It is a registered charity and not-for-profit business and receives no state or local government funding. But it makes a surplus and attracts 100,000 visitors a year and is continually expanding, with corporate business being one of the major growth areas, involving clients such as Bentley, Audi, SEAT and other 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.
171. 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 only Allied Air Forces Memorial in Europe. 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.
172. The Task Group was disappointed to note that 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. Indeed, the Director noted that 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.
173. The Director accepted that the tourism economy helped keep York on the map but questioned whether CYC was simply promoting city centre attractions or trying to sell the whole city. And he was disappointed that the aircraft museum failed in its attempt to create an 'air experience' at the former Airspeed factory in Piccadilly (later Raynard's garage) based around Amy Johnson and Nevil Shute as they had the funding lined up for what would have been the first major new tourist attraction in the city for 30 years.

174. If they had been successful the attraction would have opened until 8pm and this would have helped offset the impact of anti-social behaviour in the city centre – a problem for museum visitors arriving at the railway station, particularly at weekend, and when the museum exhibits its aircraft in the city centre.

Welcome to Yorkshire

175. In July 2017 the Task Group met Welcome to Yorkshire's (WTY) area director for North Yorkshire and York. The Task Group agreed with the area director that 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.

176. WTY want to engage more with York so it know they key areas York wants to promote and market and WTY can acts as a medium to do that. If the city has something it wants to push then WTY can showcase that as part of its overall offer.

177. While the relationship between York and Welcome to Yorkshire were described by the area director as being not what it was, WTY has quarterly meetings with MIY to talk about key areas and meetings take place at various levels to make sure York is fully represented.

178. WTY accepts that York is a key brand within Yorkshire but feels more can be done to make more people aware of its cultural offer. York cannot afford to rest on its laurels. It needs to increase its awareness about new markets. York is nationally and internationally renowned but it has to be careful it does not fall behind as other areas in the country are promoting extensively. It is important to make sure York is, and remains, a key player. Sometimes this is about getting over to businesses the benefits of wider working and recognising that seeing the bigger picture can benefit those businesses. Businesses want to see a strong Yorkshire brand through marketing and promotions and raising the region's profile and by sharing assets while at the same time retaining individual identities.

179. The Task Group accepted that the arts, culture and tourism sectors are major employers in the city and 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 do themselves because of lack of funding.

180. However, the Task Group was disappointed to note that there appears to be competition, rather than collaboration, between the Visit York PR department and their Welcome to Yorkshire counterparts. At present there is not a connection. WTY felt the two organisations need to complement each other and if an opportunity arises they can help with marketing and promotion. WTY can be a plus for MIY because it spreads the brand further.

Make it York

181. In late July the Task Group met the Managing Director of Make it York and noted that competition for the tourist pound is now so fierce that complacency is not an option and the city needs to keep evolving.

182. Make it York is developing three key themes:

- A refresh and update of the tourism strategy
- An events and festivals strategy
- The establishment of a cultural strategy through the Cultural Leaders' Group.

183. Part of the role of MIY is to ensure these three strands complement each other so there is a clear view going forward which reflects what is good for residents, tourists and cultural visitors.

184. 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. The Mediale is designed to bring the UNESCO media arts to life as a community focused event.

185. One of weaknesses of the 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 will be much easier. MIY supports the work of the Cultural Leaders' Group and carries out its administration functions.

186. The MIY MD said that 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. If

there was a cultural strategy the city would stand a much better chance of gaining additional funding.

187. The Task Group accepted that in York tourism and culture, events and festivals are interlinked and there can be too many events and festivals if the quality is not there. MIY feels that 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 also trying to organise ambitious events within an infrastructure that needs attention and in small spaces that are not suitable.

188. However, 2018 can be quite significant with a refreshed programme including:

- York being a cycle hub for the Tour de Yorkshire, followed by
- '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

189. The Task Group was disappointed to learn from MIY that in terms of economic strategy for the city, tourism and culture do not feature that strongly, but these are important sectors which promote the city as a good place to live.

190. It is important that the city takes an overview of its performance space, whether this is developed at Castle Gateway or York Central. MIY has done a lot of work with York@Large about cultural usage within the built environment, the way this work is integrated and the vision for the future. There are difficulties around the public realm in the city centre and the poor physical state of some areas, particularly around pavements. Make It York and other organisations are trying to stage events within an infrastructure that is not fit for purpose.

191. One of the issues that has been picked up is the difficulty around way-finding in the city. York is a small city and to increase visitors more space needs to be freed up. MIY is keen to promote the idea of trails – an ice trail at Christmas featuring 40 venues across the city; a ghost trail; a chocolate trail and the Advent calendar trail – to guide visitors to different locations. 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.
192. MIY feels one of the city's biggest challenge is anti-social behaviour and the organisation 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.
193. MIY also suggested that CYC could enter into a cultural partnership with the youth of the city. It could create a cultural initiative 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.
194. MIY assured the Task Group that its relationship with Welcome to Yorkshire was 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. MIY does all it can to work with these other bodies as it is in everybody's interest to have good working relationships and while the more collaboration the better it must work both ways.

Local Plan

195. 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 future and past are interdependent, and both heritage and 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. The Local Plan will 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, and 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. The Local Plan will ensure that the city's arts and cultural assets are protected and enhanced, with new assets and resources created whenever possible.
- By the end of the plan period York's Green Infrastructure, including open space, landscape, geodiversity, biodiversity and the natural environment, will 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, will have been optimised.

Economy and Retail

- A key aim of the Council's Economic Strategy (2016) 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 masterplanning 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. A Cultural Strategy for York is also currently in development.
- In meeting the policy requirements of this section, 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 masterplanning 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

- 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

Additional Funding

196. 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.

197. As a consequence York Museums Trust will receive a total investment between 2018 and 2022 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.

Regional

198. In October 2016 Historic England published Heritage and the Economy 2016 presenting key facts and figures which illustrate the benefits the historic environment brings to the economy.

199. 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.

200. 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.

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%

201. 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.

202. 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)
Domestic overnight		
Yorkshire and the Humber	£342	1.60
England	£3,549	15.94
Domestic day		
Yorkshire and the Humber	£457	15.5
England	£4,978	156.43
International		
Yorkshire and the Humber	£295	0.71
England	£9,856	17.38
Total (domestic & international)		
Yorkshire and the Humber	£1,094	17.8
England	£18,383	192.7

203. 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.

Distribution of total heritage spend

% of total domestic and international spend

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

Heritage Construction

204. 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.
205. 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.

Yorkshire & the Humber construction output (m)	2011	2012	2013	2014	2015
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%

Nationally

206. 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.
207. 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.
208. 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.

209. 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.

210. 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.

211. 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.

212. 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.

213. 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.

214. 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.

215. The Culture White Paper produced by the Department for Culture, Media and Sport and published 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.

216. The number of people employed in the cultural and creative sectors has been increasing since 2011 and now stands at 321,000.

217. 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.

218. 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.
219. 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.
220. 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.
221. 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.
222. 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 buildings and modern businesses

223. 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.

224. The research findings back up an idea about economic development that has been understood for some decades – that innovation, new products, new services – indeed, 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. All of this forms to create a ‘mosaic’ of economic activity that is attractive to workers, visitors and to business owners alike – a rich diversity of use from which the new ideas that economic development depends upon can flow.

225. 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 £47 billion 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.

Heritage as a selling point

226. At the meeting with YMT it was pointed out to the Task Group that the richness of York's heritage had formed a significant part in the marketing of the restored St Leonard's Place – a grade II listed Regency building within the city walls.

227. Its sales brochure states: "York is a forward-looking City that maintains a perfect balance between the charm of a rich heritage and the virtues of modern lifestyle amenities, with fantastic connectivity to London, Edinburgh and beyond. Embedded in the City's historic heart, St Leonard's Place enjoys exceptional views and is well placed to take advantage of York's best assets. The development, within the ancient Roman Walls, rubs shoulders with stunning landmarks, venues of culture, seductive eateries, quality shopping and grand parks, all within the environs of York Minster"

228. It adds: "Founded by the Romans in about AD 71, the City has a historic legacy which is of international significance. As an ancient centre for trade, York had long achieved standing as an important commercial hub. During the Georgian and Regency Periods, arising from the coming of the railways, the City rose to become one of England's most affluent social and cultural focal points, making it a grand and fine place to live. The contemporary York preserves, and builds upon, all of these qualities. It also retains much of its historic character and enjoys a vibrant community spirit.

229. "A collection of beautiful parks and green spaces provide the backdrop for the City, offering peaceful places to relax and stroll. Alongside St Leonard's Place lie the Museum Gardens, a ten-acre botanical park,

which was planted as St Leonard's Place was being built and now offers a sense of "country in the City". The nearby Dean's Park, one of York's best-loved spots, offers a quiet and reflective space from which to experience the magnificent Minster. The River Ouse is just minutes away with the infamous New Walk; a stately, tree-lined avenue created during the reign of George II. An artists' garden behind York Art Gallery, linking to the Museum Gardens, Marygate and Exhibition Square, forms part of this fine array of exquisite spaces.

230. "For those with a love of the arts, there's much to discover on a short stroll, with York Art Gallery and its national collections of paintings and ceramics, and Yorkshire Museum, which digs deep into the City's ancient and Roman history. The Theatre Royal, one of the country's leading producing theatres, is so close it shares your address."

Major Arts and Culture Related Festivals

231. **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.
232. 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.
233. **Mediale** is the flagship initiative of York's UNESCO designation. The first is to take place in autumn 2018 and every two years thereafter. 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.
234. 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.

235. 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.
236. 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.
237. **Vespertine** is an innovative and accessible programme of intriguing, spectacular and unique art events taking place monthly in the early evening gap between work and play. The audience of residents and visitors to York can experience a range of art forms from music and performance to light projections and art installations.
238. As well as offering inspiring experience to the audience Vespertine aims to stimulate the early evening economy by providing more reason for people to spend more time in the city to get to know its cultural depth. It emerged from 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.
239. **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.
240. **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.
241. 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 32nd year and has become a firm fixture in the York calendar.
242. **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.

243. 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.
244. **Eboracum Roman Festival** was first held in 2016 and saw more than 28,000 people attend. 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.
245. 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.
246. **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.
247. 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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Abbreviations:

BAFTA – British Academy of Film & Television Arts

BRES – Business Register & Employment Survey

CYC – City of York Council

DC Lab – Digital Creativity Laboratory

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