

**South Yorkshire Cultural and Creative Industries
data mapping & research report**

Is the paper exempt from the press and public?	No
Reason why exempt:	Not applicable
Purpose of this report:	Discussion
Is this a Key Decision?	No
Has it been included on the Forward Plan?	Not a Key Decision

Director Approving Submission of the Report:

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Executive Summary

SYMCA recently commissioned a report to map Cultural and Creative Industries across South Yorkshire, to provide evidence for policy, identify strengths and opportunities and propose recommendations on how this sector could be strengthened. This evidence suggests the sectors are key to our regional economy and identity, and therefore should be priority sectors for the MCA.

The key findings and recommendations are included in the report attached and a set of slides will be presented to the Board at its November meeting. The Board are asked to endorse the report findings and recommendations and offer guidance on their implementation.

What does this mean for businesses, people and places in South Yorkshire?

The Cultural and Creative Sectors in South Yorkshire contribute approximately £2 billion to GVA and employ over 30,000 people in 4000 businesses. These are growing sectors which not only provide employment but also contributes to the quality of place, life and reputation of the region. There is an opportunity to promote and grow this sector to attract investment and jobs into South Yorkshire. The report provides an up-to-date evidence base and highlights the sector specific opportunities and challenges.

Recommendations

1. LEP Board Members are asked to endorse the report and recommendations, consider the implications for South Yorkshire and provide their expertise on how the recommendations can be implemented.

2. Additionally, the Co-Chairs of the Business Growth Board and Employment and Skills Board are asked to champion the creative and cultural sectors at these Boards and take forward this report and recommendations for discussion on the opportunities they present for the region.
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1. Background

- 1.1 There is an increasing recognition of the opportunity that the creative and cultural sectors represent to not only economic growth and recovery, but also for healthy and sustainable communities, strong local identities, and vibrant places across the region. This is highlighted throughout the MCA's recent strategies such as Strategic Economic Plan and was recognised by the Mayor in his manifesto. A turning point was the publication of the Chamberlain Walker report in 2020 (<https://southyorkshire-ca.gov.uk/news/article/9f7dffbd-7c6d-4928-9dd4-8a031de25c9e>) and the landmark £1 million agreed in September 2021 for the sector which was so hard hit during the pandemic

- 1.2 To build the case for intervention at a regional level, SYMCA have commissioned two separate research pieces:
 - Cultural and Creative Industries Mapping - to profile and assess the strengths, weaknesses and opportunities within the commercial creative sector across South Yorkshire and offer recommendations for future areas of priority and action. This data will serve as an evidence base and rationale to assess and develop the case for investment in creative industries. The research looked at skills pathways and provision within the Creative Industries. The 5th Sector were commissioned to carry out this research and their findings are appended to this report.

 - Engagement with the sector - a programme of engagement with the region wide sector to inform the development of a strategic framework for action and investment priorities, plus to build capacity in the sector moving forward. It is critical that our strategy is informed through a thorough and open dialogue with sector stakeholders in a far-reaching and participatory process, with a clear focus on our primary aim to reverse the trend of under-investment in South Yorkshire. Opus Independents were commissioned to complete this work, the full report will be published this autumn and complements the mapping study being presented today.

Both reports were overseen by steering groups comprising regional and national stakeholders including representatives from the local authorities.

- 1.3 This commission aligns with the ambition in the SEP to deliver a stronger, fairer, and greener economy that works for everyone and explicitly recognises cultural and creative places and people within that strategic aim.

- 1.4 This research provides a comprehensive evidence base for the sector and identifies specific challenges and opportunities that require support from the LEP, MCA and partners to unlock some of the sub-region's untapped potential and accelerate its growth, impact and reputation.

2. Key Issues

2.1 Key Headline Findings:

- The contribution of the cultural and creative industries (CCI) to the economy is consistently underestimated – these findings suggest that culture and creative industries are worth up to **£2 billion in GVA**.
 - o In depth research has uncovered that the sector has many more people employed than official statistics say – 13,500 official vs 31,350
 - o This is because they miss a significant freelance creative workforce and micro-enterprises
 - o And when comparing different data sources wide discrepancies are found in the estimates of the number of CCI businesses – we actually have more than 4,000 of these businesses in the region compared to other data sources which provide estimates of 2,900 businesses
- There has been steady growth in ‘active’ registered CCI businesses over the past decade, with a notable uptick in growth during the pandemic
- We have particular strengths in creative content businesses, and with our digital capabilities, we could be well positioned to exploit the growth in demand for both high end television and short form content of all kinds.
- Although there are a high number of start-ups there is little evidence of scale-up activity amongst CCI businesses with only 101 companies having ever accessed grants for R&D.
- Each LA has distinct and complementary areas of growth and potential, and an approach that recognises these as **regional** assets is beneficial

Recommendations:

- Act quickly to redress the shortfalls in investment in its creative sector over the last decade, both in absolute terms and relative to competitor cities and city regions across the North.
- Ensure that city region marketing promotes well-established creative conferences and marketplaces, such as the Children’s Media Festival and Sheffield DocFest, alongside the work of arts and cultural institutions.
- Convene regional policy forums both for overall coordination of creative sector investment, to promote more joined up provision of creative skills and marketing of creative skills pathways
- Interventions need to support the principle of ‘doing things weirdly’ to ensure that delivery reflects the priorities and operating models of creative businesses themselves. This means gearing business support and investment around what works – established and successful programmes delivered in both public and private sectors – and taking risks in advance of private sector investors to show confidence in the sector.
- Convene, hold space, broker and facilitate forums to address equality, diversity and inclusion (EDI) collectively and in a way that is reflective of the people of South Yorkshire as it is now and how it will be. SYMCA has a critical role in

ensuring that EDI is an approach not just an outcome – and its leadership will mean it and the creative sector can flex and adapt as both local and national societal environments change.

- The sector needs to be respected for the value it brings;
 - o Economic contribution
 - o Public good – as a tool for addressing collective problems (e.g. isolation, community cohesion, wellbeing)
 - o Quality and pride of place

The Mayor, and the MCA, have an important role to play in this space. We require a regional overarching narrative of place, culture and creativity whilst appreciating the distinct identities and strengths of our local authority areas.

The summary of key themes for the MCA and LEP from the recommendations are:

- o Promotion of the sector and developing a South Yorkshire narrative with Culture and Creativity as a key component
- o Create better enabling conditions for start-ups, networking, innovation and growth which is targeted to the needs of these businesses
- o Invest in Skills development
- o Activity to address EDI is critical

2.2 A presentation of the research findings and recommendations will be provided during the meeting.

3. Recommendations

This research was commissioned to provide the Board and MCA detailed intelligence to consider future priorities linked to the recommendations contained in the report. The findings contribute to our evidence base that demonstrates the creative and cultural sectors as key to the regional economy and identity, and therefore as priority sectors for the MCA. These sectors will require recognition, support and investment within SYMCA and at regional level to thrive.

The Board are asked to endorse the following recommendations, consider the implications for South Yorkshire and provide their expertise on how the recommendations can be implemented.

- Act quickly to redress the shortfalls in investment in its creative sector over the last decade, both in absolute terms and relative to competitor cities and city regions across the North.
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 - o Economic contribution
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The Co-Chairs of the Business Growth Board and Employment and Skills Board are asked to champion the creative and cultural sectors at these Boards and take forward this report and recommendations for discussion on the opportunities they present for the region.

4. Consultation on Proposal

- 4.1 Quantitative and qualitative methods were used in this research, with stakeholders from public, private and academic organisations consulted.

5. Timetable and Accountability for Implementing this Decision

- 5.1 Some of the recommendation will inform the work of the Innovation and Business Boards and any further implementation will then depend on the outcome of the Board’s deliberations and eventual MCA Board decisions.

6. Financial and Procurement Implications and Advice

- 6.1 There are no further direct financial implications at this stage.

7. Legal Implications and Advice

- 7.1 There are no legal implications at this stage, however any investment required via the MCA, will be considered and developed in the line with the MCA approved Assurance Framework.

8. Human Resources Implications and Advice

8.1 There are no HR implications at this stage

9. Equality and Diversity Implications and Advice

9.1 Equality and diversity are at the core of this research. All recommendations will improve equality and diversity in South Yorkshire.

10. Climate Change Implications and Advice

10.1 There are no direct climate change implications at this stage

11. Information and Communication Technology Implications and Advice

11.1 There are no ICT implications at this stage

12. Communications and Marketing Implications and Advice

12.1 SYMCA will disseminate the findings through its usual channels.

List of Appendices Included

A SYMCA Cultural and Creative Industries Data Research and Mapping Report June 2022

Background Papers

None.