

# South West

## CASE Regional Insights

The CASE (Culture and Sport Evidence) programme is a joint strategic research programme, led by DCMS in association with Arts Council England, English Heritage, Museums, Libraries and Archives Council and Sport England. The programme aims to influence the policy agenda in culture and sport in England by generating high quality, relevant research with easy access to a range of analysis and data for partners to build sound arguments.

As part of the CASE programme, Regional Insights has been developed to provide partners with data and evidence on the position and role of culture and sport within key local and regional agendas.

## The purpose of this work

The aim of the project is to provide culture and sport agencies, local authorities and other public bodies with a set of statistical data about CASE sectors. The data is organised within a number of themes such as the economy, education and engagement. Within each theme, the data is broken down by region and, where possible, local authority area. The consistent format allows for comparison across and within sectors and geographies. The importance of particular themes and sectors will vary by place, but the overall approach to accessing, comparing and using the data will be similar.

Regional Insights has been designed to deliver a quantitative picture, to help local partners to identify key trends in culture and sport in their area and where there is potential for growth. Combined with other research and local knowledge, this data can point to areas where further investment is justified.

The purpose is to provide consistent quality data, which enables users to quickly and easily identify quantitative evidence to support the development of clear arguments for investment in culture and sport.

## How should it be used?

Regional Insights is a dataset – a compendium of quantitative data and facts. The dataset is accompanied by a summary report for each region. These reports are not intended to provide a comprehensive interpretation of the

data. Rather, they provide an overview of the type of data available so that you can choose what to interrogate in more detail.

This report is the 2010 South West Regional Insights report. The dataset used to support this report contains the most current data available from the various different sources. The data should be used alongside the qualitative insight you have about the working context of your locality or region. It is not designed to provide the whole story, but to support you in writing it. You decide what data is most important and how to link it to your priorities.

## Where you can find the data

The dataset is available to download from the [CASE website](http://www.culture.gov.uk/case/).<sup>1</sup>

There are 8 sections in the dataset:

Section	Data contained
CASE Economy	Gross value added, businesses, turnover, employment, volunteering, and business start-up.
Non-capital Investment	Local authority, central government, lottery and private investment in the sector.
Capital Investment	Sector specific capital investment, local authority land acquisition and construction.
Tourism	Domestic overnight tourism, inbound tourism, visits to visitor attractions
Education	Participation in Higher Education, Further Education GCSE level education and in non mainstream CASE related education programmes
Physical Assets	Number and density of physical assets.
Engagement	Participation in activities across CASE sectors and levels of satisfaction
Community & Wellbeing	Feelings on community cohesion, belonging, community safety

For further information on the CASE programme please visit [www.culture.gov.uk/case/](http://www.culture.gov.uk/case/) or email [case@culture.gsi.gov.uk](mailto:case@culture.gsi.gov.uk).

<sup>1</sup> [http://www.culture.gov.uk/what\\_we\\_do/research\\_and\\_statistics/7276.aspx](http://www.culture.gov.uk/what_we_do/research_and_statistics/7276.aspx)

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# South West

## 2010: Key Statistics

The CASE economy in the South West:

- Employs 189,000 people
- Includes 15,500 businesses
- Contributes £3 billion in Gross Value Added (GVA)
- Generates £4.1 billion/year in spend from domestic tourists

Across the CASE sectors in the South West:

- 406,000 people work on a voluntary basis
- The average business turns over £380,000
- 4,500 new businesses were started over the past 3 years
- There are 26,600 physical assets

Investment in the sector totals:

- £337 million in non-capital investment from local government
- £71 million<sup>2</sup> in capital focused investment from local government
- £25 million<sup>3</sup> in lottery non-capital investment
- £17.2 million in private investment in the arts

Engagement in the sector is extensive:

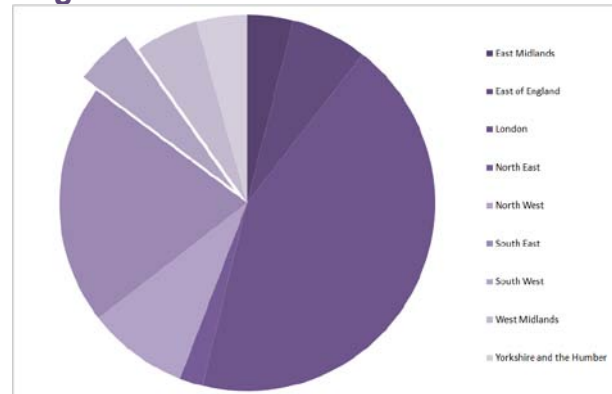
- 2.4 million people participating in cultural activity<sup>4</sup>
- 714,000 participating in 3 sessions of sport per week
- 103,000 people studying at GCSE level
- 24,000 higher education students
- 104,000 people studying at FE institutes

<sup>2</sup> Not including Heritage spending, this is captured under non-capital investment.

<sup>3</sup> Investment in the arts, sports and heritage.

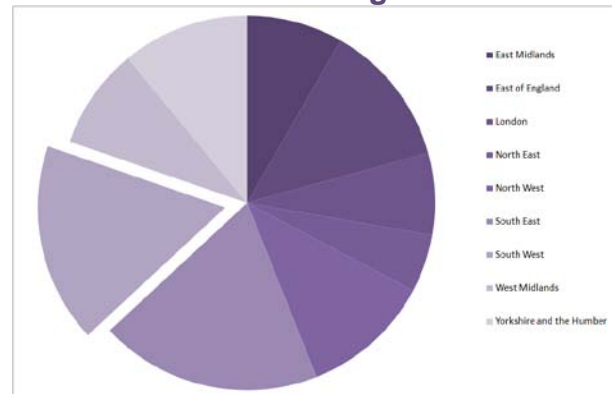
<sup>4</sup> Includes participation in: craft, dance, literature, music, theatre and the visual arts.

## South West GVA as a proportion of total GVA for the CASE sectors across England.



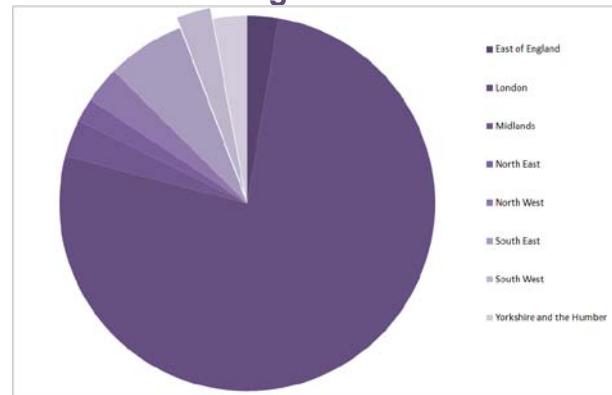
Source: ONS, ABI (2009)

## South West physical assets as a proportion of the total assets in the CASE sector across England.



Source: IM, POI (2009)

## South West private investment in the arts as a proportion of total private investment in England.



Source: A&B (2009)

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## CASE Economy

Data in this section is drawn from the CASE Economy data tables available from the Regional Insights website. Key sources include:

- Annual Population Survey (APS)
- Annual Business Inquiry (ABI)
- Inter-Departmental Business Register (IDBR)
- Trends Central Resource (TCR)

Across the South West 189,000 people are employed in the CASE sectors. This decreased by 1% between 2006 and 2008.

Outside London and the South East, the South West has the second highest regional employment in the creative sector. Heritage employment in the region was also the greatest outside of London. South West heritage employment increased by 18% between 2006 and 2008, rising from 6,700 to 7,900.

CASE sectors attract high levels of volunteer engagement. Approximately 406,000 people undertook voluntary work in the South West during 2007/08 in the arts, museums and galleries, heritage, libraries, archives and sports.

There are 15,500 CASE organisations in the South West, contributing £3 billion GVA in 2007/08. Of these 15,500, 4,500 are new start-ups since 2006. The large majority (4,100) of new start-ups are creative businesses.

GVA produced by CASE sectors increased in the South West by 6% between 2005/06 and 2007/08, from £2.8 billion to £2.9 billion. More than three quarters (87%) of CASE GVA produced in 2007/08 was contributed by creative firms.

## Top 5 Local Authorities in the South West by number of CASE businesses

Local Authority	Businesses
City of Bristol	1,579
Bath and North East Somerset	786
North Wiltshire	735
South Gloucestershire	733
North Somerset	592

Source: IDBR (2009)

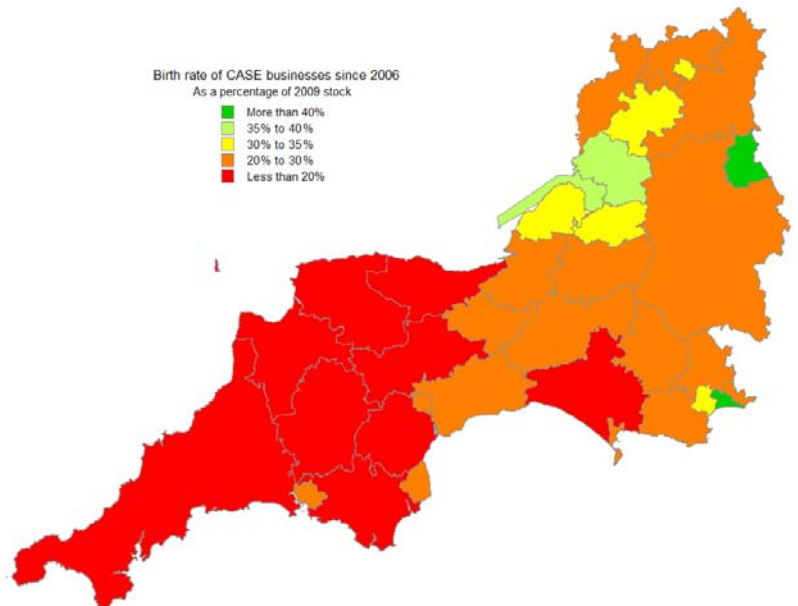
## Top 5 Local Authorities in the South West by level of CASE employment

Local Authority	Businesses
City of Bristol	19,446
Bath and North East Somerset	6,278
Bournemouth	4,521
Poole	3,563
Plymouth	2,860

Source: ONS, APS (2009)

## Start-up rates across the region by local authority

Source: TCR (2009)



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## Non-Capital Investment

Data in this section is drawn from the non-capital investment data tables available from the Regional Insights website. Key sources include:

- Department for Communities and Local Government (DCLG), Local Government Finance Statistics (LGFS)
- Department for Culture Media and Sport (DCMS), National Lottery database (NLD)
- Arts Council England, (ACE) Regularly Funded Organisations (RFO) Annual Submission Dataset
- Arts & Business (A & B) Annual Investment in Culture Survey
- Heritage Lottery Fund (HLF) Initial Grant Decisions Data

This report focuses on non-capital investment in sector development by Local Authorities. For example, service or community development.

Between 2004/05 and 2008/09 local authority investment in CASE sectors increased in real terms in all regions bar one<sup>5</sup>. The third largest percentage increase in CASE sector investment was in the South West, where local authority expenditure increased by 10% over the period; reaching approximately £337 million in 2008/09.

In most regions, sports and MLA expenditure represent the majority of local authority spending on CASE sectors. In the South West, in 2008/09, sports funding was worth £126 million and MLA funding was worth £130 million of all local authority spend in the region.

Local authority investment in the arts increased by 13% between 2004/05 and 08/09 (from £58 million to £66 million). The England average was a 9% increase on 2004/05 expenditure.

Local authority investment in sports services was £126 million in 2008/09. The South West also has the 6th greatest density<sup>6</sup> of local authority investment in sport, with £431,000 per 10,000 people invested in 2008/09; compared to £604,000 in the North East and £539,000 in Yorkshire and the Humber.

Although in real terms, investment in the region's library services increased by 3% between 2004/05 and 2008/09, local authorities in the South West made one of the lowest investments in these services in both years – in 2008/09 this was £92 million.

Local authority investment in heritage increased from £4 million to £15 million across 2004/05 – 2008/09. The density of heritage spending in the region was the highest in 2008/09, at £51,000 per 10,000 people compared to an average of £22,000 across England.

## Top 10 LAs for non-capital investment in CASE sectors in 2008/09

Local Authority	Investment £000s
City of Bristol	46,205
Bournemouth	21,679
Swindon	21,516
Plymouth	18,544
Bath and North East Somerset	14,080
North Somerset	11,263
Cheltenham	10,545
Exeter	9,162
Wiltshire	8,222
South Gloucestershire	6,987

Source: DCLG, LGFS (2009)

<sup>5</sup> Investment in CASE sectors in the East of England reduced by less than 0.02% between 2004/05 and 2008/09.

<sup>6</sup> Investment in thousands of pounds per 10,000 of the working age (WA) population of that administrative area – local authority or region.

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## Capital Investment

Data in this section is drawn from the Capital Investment data tables available from the Regional Insights website. Key sources include:

- Department for Communities and Local Government (DCLG), Local Government Finance Statistics (LGFS)
- Department for Culture, Media and Sport (DCMS), National Lottery database (NLD)
- Sport England (SE) Exchequer Funding Data

Local authority capital expenditure is divided between acquisition of land and existing buildings (hereafter acquisition investment) and new construction, conversion and renovation (new construction investment) References to 'CASE sectors' in this section exclude heritage, as data was not available.

Between 2004/05 and 2008/09 local authority capital investment in CASE sectors increased in real terms in all regions bar one<sup>7</sup>. The second greatest percentage increase in CASE sector investment was in the South West, where local authority capital expenditure increased by 78% over the period; reaching approximately £71 million in 2008/09. In most regions sports expenditure represents the majority of local authority capital spend<sup>8</sup>, although in the South West, 2008/09 arts investment was greater.

A significant proportion of capital investment in the arts in the region in both 2004/05 and 2008/09 was made on new construction as part of the museums and galleries funding stream. In 2004/05 this accounted for 43% of South West capital investment in the arts, and increased to 55% in 2008/09. The majority of the remainder of South West arts capital expenditure was on new construction as part of arts activities and facilities funding.

<sup>7</sup> Capital investment in CASE sectors in the North East reduced by 2% between 2004/05 and 2008/09.

<sup>8</sup> LA expenditure on capital investment only covers the arts (which includes museums and galleries), sports and libraries.

This pattern is typical of most regions, where new construction makes up the vast majority of investment, far exceeding that made in acquisitions. An overall increase of 372% in capital investment in the arts between 2004/05 and 2008/09 within the South West meant that the region increased from having the lowest to the second greatest expenditure.

Local authorities in the South West made the lowest investment in sports capital assets, spending £28 million in 2008/09. This was a 6% decrease on 2004/05 expenditure and was the only region where investment did not increase between 2004/05 and 2008/09. Most regions increased expenditure over this period by at least 30%. The majority of South West expenditure in both years was on new construction of sports facilities (80% in 2008/09).

The South West approximately trebled expenditure on capital assets within its library services between 2004/05 and 2008/09, increasing expenditure from £3.7 million to £11.2 million. Almost 100% of this investment in 2008/09 was on new construction. The remainder was spent on acquisition of capital assets within the libraries service.

### Top LAs for capital investment in new construction conversion & renovation by investment area in 2008/09

Investment Area	Local Authority	Investment £000s
<b>Museums and galleries</b>	City of Bristol	12,656
<b>Arts activities and facilities</b>	City of Bristol	10,619
<b>Sports facilities</b>	Bournemouth	5,661
<b>Library services</b>	Swindon	5,148

Source: DCLG, LGFS (2009)<sup>9</sup>

<sup>9</sup> Please note that there is no data available for heritage.

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# South West

## Tourism and Physical Assets

Data in this section is drawn from the *Tourism and Physical Assets* data tables available from the *Regional Insights* website. Key sources include:

- Visit Britain (VB), ONS International Passenger Survey (ONS-IPS)
- Enjoy England (EE), UK Tourism Survey (UKTS)
- Enjoy England (EE), Annual Visitor Attractions Survey via (AVAS)
- InterestMap (IM), Points of Interest (POI)

In both 2006 and 2009, the South West was the destination for 20% of domestic tourist trips, the most popular region in both years. Trips to the region increased by 3% across the period, demonstrating the region's consistent appeal. Domestic tourists to the region spent a total of £4.1 billion in 2009, a 12% increase compared to 2006.

Visits to the South West by international visitors increased by 14% between 2004 and 2008. Despite this increase, greater changes in other regions meant that the South West reduced its share of non-domestic visitors from 10% to 8% between 2004/05 and 2008/09.

Overseas visitors spent a total £983 million in the South West in 2008, representing 7% of national expenditure that year. This was up the same proportion of total overseas expenditure as in 2004, although there had been an increase by 38% in the amount spent within the region between 2004 and 2008.

Overall, visits to attractions in the South West decreased by 1% between 2004 and 2008. The South West has the highest number of arts, sports and MLA physical assets per 10,000 people. The largest proportion of these assets are heritage related (57%).

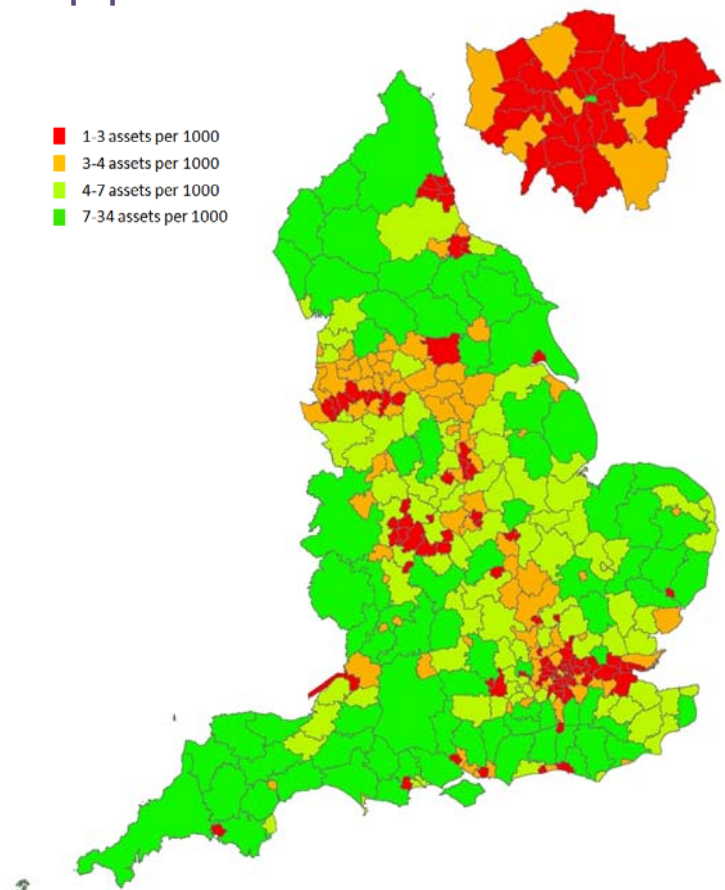
In most regions, sports assets make up the majority. The number of sports assets per 10,000 people in the South West (31.29) is still higher than the England average of 21.36.

## Top 5 visitor attractions by number of visits 2008

Attraction	Visitors (000s)
<b>Grand Pier, Weston-super-Mare</b>	2,000
<b>Ashton Court Estate</b>	1,602
<b>The Eden Project</b>	1,093
<b>Stonehenge</b>	884
<b>Roman Baths</b>	835

Source: AVAS, EE (2008)

## Density of all arts, museums, libraries, sports and heritage assets per head of population as at 2008/9



Source: IM, POI (2009)

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# South West

## Education

Data in this section is drawn from the Education data tables available from the Regional Insights website. Key sources include:

- The Department for Children, Schools and Families (DCSF, Research and Statistics Gateway (RSG), GCSE results in maintained schools by Local Authority
- Higher Education Statistics Agency (HESA) Students in Higher Education (SHE)
- The Data Service (DS) Individualised Learner Record (ILR)
- Arts Council England (ACE, Regularly Funded Organisations (RFO) Annual Submission Dataset
- English Heritage (EH), Heritage Counts (HC)
- Sport England (SE), Active People Survey (APS)

The total number of students studying a CASE related subject at GCSE level in the South West fell by 5% between 2007/08 and 2008/09. This was a slightly lower percentage fall than was experienced across England in the same time period.

In 2008/09, the largest proportion of CASE GCSE students (28%) in the South West studied a design and technology course, the same proportion to the England average (28%). The second greatest proportion of students in the South West studied an art and design subject (17%).

The number studying a physical education GCSE fell by 9% between 2007/08 and 2008/09. Media/film/tv subjects experienced a marginal increase in the number of students, rising by 0.3% in the South West compared with a 4% fall across England between 2007/08 and 2008/09.

Whilst the number of people studying a CASE related GCSE has fallen, these subjects have grown in popularity at a higher education level in recent years. In

the South West, the number of students studying CASE related subjects in higher education increased by 17% between 2004/05 and 2008/09 from 21,000 to 24,400. This compared to an increase of 13% across England.

In the South West in 2008/09, 71% of CASE students in higher education were studying arts, 18% sports, 11% heritage and just 0.2% a museums, libraries or archive-related subject.

## Top 5 HEIs for number of students studying a CASE subject

University	Students (000s)
University of Plymouth	3.9
Uni. Of the West of England (Bristol)	3.5
Bournemouth University	3.2
University College, Falmouth	2.6
Bath Spa University	2.6

Source: HESA, SHE (2008/09)

## Change in participation in CASE HE courses and average across all courses between 2004/05 and 2008/09

Course	Percentage change
Arts	8%
Sports	86%
MLA	-27%
Heritage	12%
CASE total	917
All Higher Education	11%

Source: HESA, SHE (2008/09)

## Top 5 LAs for number of students achieving A-G in a CASE subject in 2008/09

Local Authority	Students (000s)
South Gloucestershire	5.5
Plymouth	4.7
City of Bristol	4.4
North Somerset	4.0
Bath and North East Somerset	3.8

Source: DCSF, RSG (2009)

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department for culture, media and sport



MUSEUMS LIBRARIES ARCHIVES COUNCIL



# South West

## Engagement

Data in this section is drawn from the Engagement data tables available from the Regional Insights website. Key sources include:

- Department for Culture Media and Sport (DCMS), Taking Part Survey (TPS)
- Sport England (SE), Active People Survey (APS)

The proportion of people that had participated in a cultural event in the last year in the South West was 58% in 2007/08. This compared to the England average of 53%.

As with the whole of England, the proportion of people that had taken part in each type of cultural activity in the South West varied considerably. For example, whilst 71% of people had participated in literature activity in 2007/08, only 22% had participated in a craft activity.

In 2008/09, 16% of people in the South West took part in at least three sessions of moderate intensity sport per week. If recreational walking and cycling are included in the calculations this figure increases to 23%. The area with the highest percentage of sporting participants (including recreational walking and cycling) is the Isles of Scilly (32%), whilst the lowest is Sedgemoor (20%).

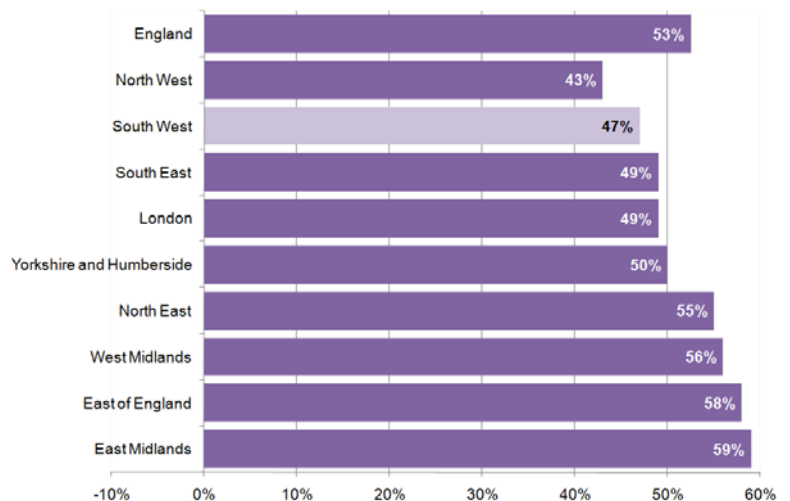
The percentage of people that had attended a sporting event (as a spectator) in the previous four weeks rose from 13% in 2005/06 to 16% in 2007/08. This is compared to 15% in England in both years.

In 2007/08 attendances at archives (6%), libraries (46%) and museums or galleries (40%) were comparable to the percentage across England as a whole.

In the South West, 21% of people had attended a place connected with industrial history, compared with only 20% across England.

The percentage of people in the South West that had attended an arts event in the previous year was 72% in 2007/08. This compares to 67% across England in the same year. Attitudes towards arts activities rated on a scale of 1-10 scored an average of 8.0 in the South West, the same figure as for England in both 2006/07 and 2007/08.

## The percentage of people that participated in a cultural activity in 2007/08, by region and compared to the average for England



Source: DCMS, TPS (2007/08)



# South West

## Community and wellbeing

Data in this section is drawn from the Community and Wellbeing data tables available from the Regional Insights website. Key sources include:

- Department for Communities and Local Government (DCLG), Citizenship Survey (CS)

Within the South West, 83% of those surveyed think that people from different backgrounds get on well together and 17% think that people from different backgrounds do not get on well together. The region had average agreement rates, with the average for England being 83% agreement and 17% disagreement.

The South West has a slightly above average rate of agreement with the statement that 'I have friends with different incomes to me', at 66%. However, the region has the second lowest rate of agreement with the statement 'I have friends from different ethnic groups to me': 41% agreed with the statement, compared with 52% for England

People in the South West have the lowest fear of crime; 35% of individuals stated that they were worried about crime compared with the national average of 42%. The South West also has the second lowest percentage of regional respondents who are very worried about crime (7%).

The majority of individuals in the South West (80%) feel very safe or fairly safe walking alone in their neighbourhood after dark. This significantly higher than the national average of 73%.

A lower than average proportion of people feel either very unsafe or never walk alone in their neighbourhood after dark (8%). Nationally, 10% feel this way.

When considering life in their neighbourhood, 77% of respondents in the South West felt strongly that they belonged to their neighbourhood. Approximately 13% thought that their local area had improved in the past 2 years, a little worse than the national figure (15%).

Only 7% of people in the South West stated that they did not feel part of British society. Of those surveyed in the South West, 53% thought that the number of immigrants entering Britain should be reduced a lot, 28% thought it should be reduced a little and the remainder thought it should either remain the same or be allowed to increase. These findings are similar to the national average.

## The percentage of people that feel that they strongly belong to their neighbourhood in 2008/09, by region and compared to the average for England

Region	Percentage population
West Midlands	80%
North East	80%
North West	79%
East of England	78%
Yorkshire and the Humber	78%
South West	77%
East Midlands	76%
South East	76%
London	74%
England	77%

Source: DCMS, CS (2008/09)

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