West Yorkshire Combined Authority | Tracy Brabin Mayor of West Yorkshire

Report to:	Culture, Heritage and Sport Committee
Date:	27 October 2023
Subject:	**Economic and Sector Reporting**
Director:	Alan Reiss, Chief Operating Officer
Author:	Peter Glover, Economic Evidence Manager

Is this a key decision?	☐ Yes ☒ No
Is the decision eligible for call-in by Scrutiny?	☐ Yes ☒ No
Does the report contain confidential or exempt information or appendices?	☐ Yes ☒ No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	☒ Yes ☐ No

1. Purpose of this Report

1.1. To set out the baseline position for State of the Region indicators relating to Culture, heritage and sport.

2. Information

State of the Region Indicators

2.1. State of the Region is an annual stock-take of West Yorkshire's progress against key economic, social, transport and environmental indicators produced by the Combined Authority. The indicators reflect the outcomes and impact the Combined Authority and its partners want to achieve in order to improve the lives of people in West Yorkshire. State of the Region will be published later in 2023.

2.2 In 2023, the State of the Region indicators have been structured around the content of the five Missions set out in the West Yorkshire Plan. State of the Region will provide the mechanism by which progress against the West Yorkshire Plan Missions will be reviewed. Additional indicators put forward in the West Yorkshire Plan have been incorporated into State of the Region 2023. Performance against two indicators that are of specific relevance to the Committee is examined below. The data presented provides a baseline position for future monitoring and contributes to our understanding of the performance of Culture, heritage and sport in West Yorkshire.

Participation in Culture, Heritage and Sport Activities

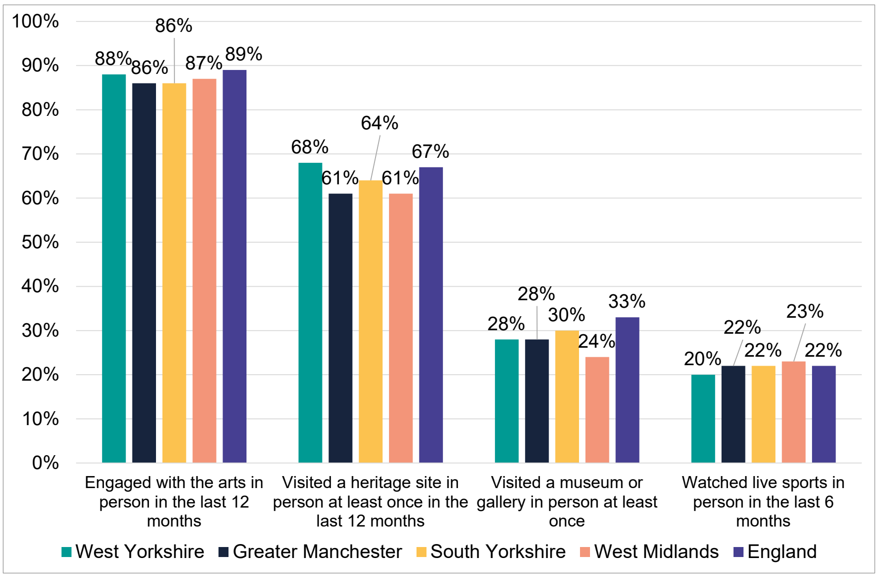
2.3 In the West Yorkshire Plan, access to culture, heritage, and sport is identified as a key ingredient for happy communities. This reflects the focus of the Culture, Heritage and Sport Framework, a key theme of which is to ensure everyone in West Yorkshire can enjoy culture, heritage and sport. A key measure of success is the number of people who engage with these activities.

2.4 The Department for Culture, Media and Sport's Participation Survey is a continuous push to web survey of adults aged 16 and over in England, with paper surveys available for those not digitally engaged. The survey aims to provide statistically representative national estimates of adult engagement with the DCMS sectors. It provides data at a county level to meet user needs, including providing evidence for the levelling up agenda. There were 960 West Yorkshire respondents to the 2021/22 survey, which provides the basis for the results set out here.

2.5 The latest figures show that engagement with the arts is at a high level, with almost nine out of 10 West Yorkshire adults engaging with the arts in the previous 12 months. Around two-thirds of adults visited a heritage site in the previous year, whilst more than a quarter visited a museum or gallery. One fifth of West Yorkshire adults watched live sports in the previous six months.

2.6 The proportions for West Yorkshire are in line with the national average in each case, except for visits to museums and galleries which is lower to a statistically significant degree.

Figure: Adults' engagement with the arts, heritage, museums / galleries, and live sports, 2022/23



Source: Statistical Release for Participation Survey, October 2021 - March 2023, Department for Culture Media and Sport

2.7 Data is available from the Participation Survey to enable us examine changes in levels of engagement between 2021/22 and 2022/23. At national level there were statistically significant increases in engagement across all indicators. The biggest improvement was for visits to a museum or gallery. At West Yorkshire level the data also shows increases for all indicators, but these are not statistically significant due to the relative lack of precision of the estimates at this level. The single exception is visits to a museum or gallery which does show a statistically significant increase on the previous year for West Yorkshire.

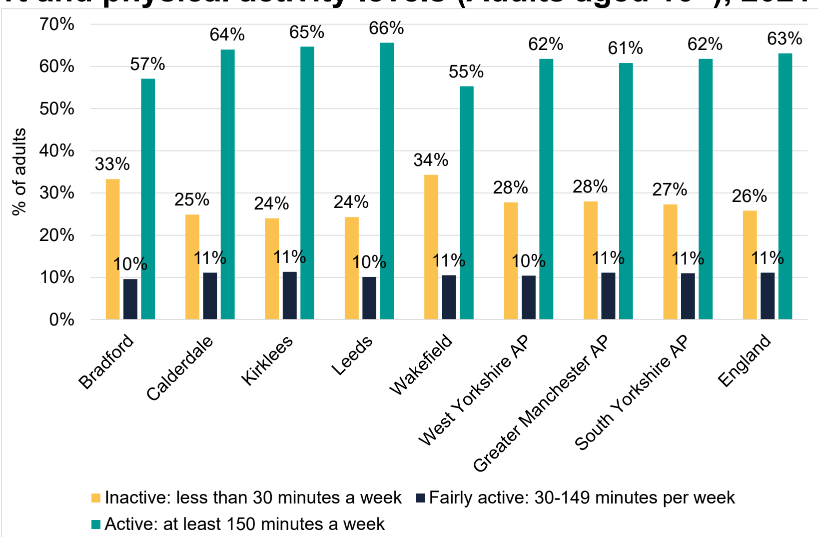
Sport and Physical Activity

2.8 The West Yorkshire Plan commits to putting the wellbeing of West Yorkshire's people at the forefront of the regional agenda, ensuring that where you live helps promote good health, active lives, and wellbeing.

2.9 Sport England's Active Lives Survey provides a comprehensive view of how people are getting active, with results available down to local authority level. The Active Lives Adult Survey is a survey of members of the public aged 16 or over. It is a "push to web" survey with the option to complete online or via a paper questionnaire. There were 4,460 responses to the survey from West Yorkshire residents 2021/22 iteration of the survey.

2.10 The latest available figures, for 2021/22, show that 62% of adults in the West Yorkshire Active Partnership[1] area can be classed as active (at least 150 minutes of activity[2] per week) with a further 10% classed as fairly active (30-149 minutes). The remaining 28% of adults are inactive, with less than 30 minutes of physical activity per week. This profile of activity is very similar to the national average and also to the picture for comparable devolved areas.

Figure: Sport and physical activity levels (Adults aged 16+), 2021-22

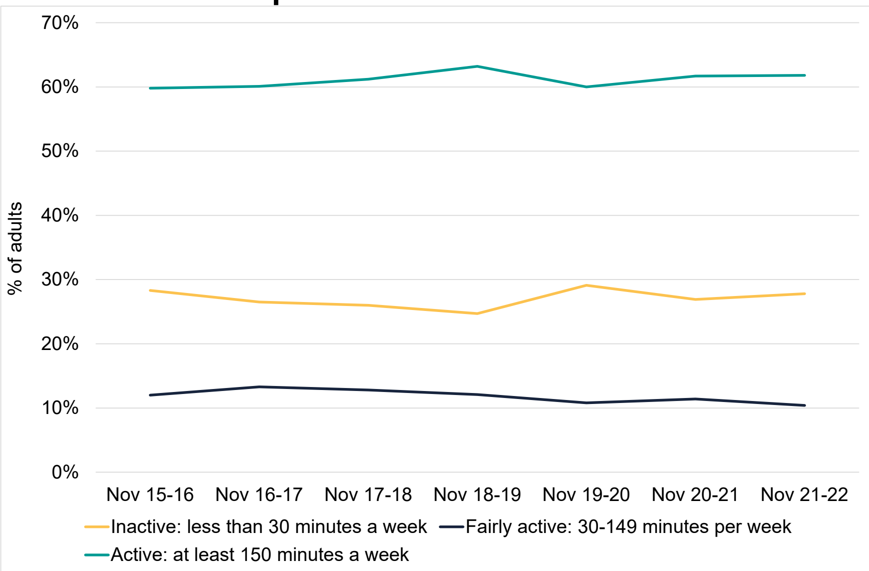


Source: Sport England Active Lives Adult Survey

[1] West Yorkshire Active Partnership is part of a network of 43 Active Partnerships who are locally-led, non-profit, strategic organisations cover the whole of England, bringing together people and organisations to increase physical activity levels.
[2] This is based on the number of minutes of moderate intensity equivalent (MIE) physical activity

2.11 There is strong evidence for the life-changing benefits of being active for people of all ages, in terms of physical and mental health and by connecting and strengthening communities. People who get active have greater levels of happiness, life satisfaction and feeling worthwhile. These benefits deliver value to our healthcare systems, society and economy. Therefore, the potential impact of an increase in physical activity is substantial.

Figure: Trend in Sport and physical activity levels (Adults aged 16+), West Yorkshire Active Partnership



Source: Sport England Active Lives Adult Survey

2.12 Looking at the period from 2015/16 to 2021/22 the profile of activity among adults has remained stable, with no statistically significant changes over this period or between 2020/21 and 2021/22.

<u>Update on Economic Data</u>

<u>National Economic Context</u>

2.13 The latest available data presents a mixed picture for the sector. In summary:

- Employment in *Arts, entertainment and recreation*[3] has been flat in the last year but has grown steadily in *Information and Communication*[4] over the same period.
- The *Information and communication sector* has seen strong growth in pay since early 2021 whilst the picture has been more subdued in the *Arts, entertainment and recreation sector.*

[3] This category includes: Creative, arts and entertainment; Libraries, archives, museums; Gambling and betting activities; and Sports, amusement, recreation

[4] This category includes: Publishing activities; Motion picture, video and TV programme production, sound recording and music publishing activities; Programming and broadcasting activities; Telecommunications; Computer programming, consultancy; Information service activities.

- The output of the *Information and Communication* sector has been growing steadily in the last two years, prior to a downward dip in the latest figures for July. The output of the *Arts, entertainment and recreation* sector has been on a strong upward trend since the beginning of the year.

Output (Figure 1 of Appendix)

2.14 The *Arts, entertainment and recreation* sector has seen an upward trend in terms of output since the beginning of 2023, growing by 17%. The latest figures show that there was growth of 7% in the sector's output between June and July 2023 (although it should be noted that the data is volatile on a month to month basis).

2.15 *Information and Communication* saw a decline of 2% in output between June and July 2023, offsetting growth earlier in the year. Prior to the July 2023 figures the sector's output had been on a steady upward trend and was still around 2% higher in July 2023 than in July 2022.

Employment (Figure 2)

2.16 Seasonally adjusted employment in the *Arts, entertainment and recreation* sector remained broadly flat across England between March 2023 and June 2023, growing by around 4,000 or 0.4%. This continues a trend seen over the last year during which the sector's employment has grown by 1% or 7,200, compared with growth of 2% across the wider economy. As of June 2023, employment in the sector remains 17,000 or 2% lower than in December 2019 (pre-pandemic).

2.17 Employment in the *Information and Communication* sector grew by 1.1% (+17,000) between March 2023 and June 2023 and was 5% (+71,000) higher than in June 2022. Employment in the sector is 182,000 or 13% larger than pre-pandemic (December 2019).

Pay (Figure 3)

2.18 At £1,126 per week, average earnings in the *Information and Communication sector* are 69% higher than across the *Whole Economy* average (£664), based on figures for July 2023. Average weekly earnings for *Arts, entertainment and recreation* are, at £464, 30% lower than the *Whole Economy* average.

2.19 The figures for average weekly earnings in *Arts, entertainment and recreation* declined by 7% year-on-year in nominal terms in July 2023. However, the data is volatile and, as the chart shows, the underlying trend seems to be upward since early 2022. *Information and communication* saw strong year-on-year earnings growth of 11%, compared with the equivalent figure for the wider economy of 8%. Both sectors saw a decline in average earnings between June and July, reflecting the position for the wider economy and signs of a potential softening of labour market conditions.

Vacancies (Figures 5 and 6)

2.20 According to the ONS Vacancy Survey the number of UK vacancies in the *Arts, entertainment and recreation* sector grew by 4% in the June to August 2023 quarter compared to the March to May 2023 quarter. In contrast vacancies across the wider economy fell by 6%, whilst vacancies in *Information and communication* fell by 12% over the same period.

2.21 The current level of vacancies for both *Arts, entertainment and recreation* and *Information and communication* remain higher than pre-pandemic levels (13% and 5% higher respectively than in December to February 2020 period) but have fallen from their peaks in 2022.

2.22 *Arts, entertainment and recreation* and *Information and Communication* are ranked sixth and ninth respectively in terms of the sectors with the highest ratio of vacancies to jobs. These ratios have declined from their peaks in early 2022, reflecting the softening in recruitment demand.

2.23 Data from online job postings allow us to assess the vacancy situation in West Yorkshire[5] for occupations that are relevant to the sector; although the picture is not directly comparable to national vacancy figures. The data shows that recruitment activity remains relatively strong in historic terms, although it is now trending somewhat lower than at its peak period during late 2022 and early 2023 (see figure 6). Nonetheless, the annual count of unique postings for the period September 2022 to August 2023 was 45,800, 8% higher than in the previous year. Meanwhile, the count of postings at national level fell by 9% for the same period, indicating that West Yorkshire continues to outperform the national average in terms of recruitment into the sector.

2.24 The biggest occupational categories in terms of online job postings continue to be *IT, software and computer services* and *Advertising and marketing*. There are signs of slackening in demand for digital roles, which is contributing to the wider slowdown in the vacancy picture.

Visitor attraction data

2.25 Each year Visit Britain invites English visitor attractions to take part in an annual survey a key purpose of which is to capture visitor numbers. The following table summarises the top attractions in West Yorkshire, based on this survey data. Some key attractions are not featured and may not have responded to the survey. Across all West Yorkshire attractions for which data is available the number of visitors increased by 44% between 2021 and 2022, a similar rate of increase the overall national picture.

[5] Note that an occupational definition is used for the analysis of West Yorkshire online job postings whereas ONS' UK vacancy analysis uses industry sectors. Therefore, the basis for each analysis is different.

Table: Top visitor attractions in West Yorkshire based on survey data collected by Visit Britain

Attraction	District	Category	Visitors 2022
Leeds Art Gallery	Leeds	Museum and/or Art Gallery	308,147
Harewood House	Leeds	Historic House/ House and Garden / Palace	292,566
Leeds City Museum	Leeds	Museum and/or Art Gallery	242,638
Lotherton Hall & Gardens	Leeds	Museum and/or Art Gallery	208,771
National Science and Media Museum	Bradford	Museum and/or Art Gallery	177,847
Nostell Priory & Parkland	Wakefield	Historic House/ House and Garden / Palace	142,426
Kirkstall Abbey	Leeds	Museum and/or Art Gallery	132,175
Whistlestop Valley	Kirklees	Steam / Heritage Railway	68,858
The Hepworth Wakefield	Wakefield	Museum and/or Art Gallery	67,645
Cliffe Castle Museum	Bradford	Museum and/or Art Gallery	57,630

Source: Annual Survey of Visits to Visitor Attractions, Visit Britain

2.26 The highest ranked attraction in Calderdale, according to the Visit Britain data, is Halifax Minster, with 23,500 visitors.

2.27 In conclusion, national figures indicate that both broad elements of the sector have performed relatively strongly in output terms so far this year but that there has been a divergence on employment and pay, with *Information and Communication* performing more strongly that *Arts, entertainment and recreation*. Local figures suggest that vacancies for jobs linked to Culture, heritage and sport has fallen from peak levels but still outperforms the national average. Meanwhile, the latest data for West Yorkshire visitor attractions shows that overall visitor numbers grew between 2021 and 2022.

3. Tackling the Climate Emergency Implications

3.1. There are no climate emergency implications directly arising from this report.

4. Inclusive Growth Implications

4.1. National evidence shows that people from the most deprived neighbourhoods are significantly less likely to engage with the arts and heritage sectors.

5. Equality and Diversity Implications

5.1. The likelihood of engaging with the arts and heritage sectors varies for different groups, according to national evidence. For example, people from the Chinese ethnic group are most likely to engage with the arts, while people from the Pakistani group are least likely to engage.

6. Financial Implications

6.1. There are no financial implications directly arising from this report.

7. Legal Implications

7.1. There are no legal implications directly arising from this report.

8. Staffing Implications

8.1. There are no staffing implications directly arising from this report.

9. External Consultees

9.1. No external consultations have been undertaken.

10. Recommendations

10.1. That the Committee notes the messages from the report.

11. Background Documents

There are no background documents referenced in this report.

12. Appendices

APPENDIX 1 – Economic and sector reporting