

Arts Council England

A High Street Renaissance

How arts and culture bring people and pride back to our high streets

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BOP
Consulting



Credits

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Executive Summary

Culture is a vital ingredient for successful high streets. Such high streets are now typically multi-functional. They do not exclusively depend upon their retail offers to secure footfall and spending. They offer a combination of experiences and amenities, including culture, to attract locals and those travelling from further afield. Theatres, gigs, art galleries and museums depend on human congregation. This has made them hard hit by Covid-19. But the £1.57 billion Culture Recovery Fund has helped to preserve the cultural sector. After more than 17,500 chain store outlets closed on high streets in 2020,¹ the presence of culture on the high street has weathered Covid-19 more effectively than retail.

Of the buildings used by organisations funded by Arts Council England,² 75% are either on or within a five-minute walk (500m) of a high street in England. This high street presence:

- **Builds civic pride:** 62% of UK adults agree that cultural experiences on the high street give them a sense of pride about their local area, according to new polling to support this research.
- **Defends against high street decline:** Closure of high street retail dents civic pride and creates spirals of decline.
- **Footfall as an indicator of high street vitality:** Culture drives footfall and spending. Many cultural activities require in-person settings, which drive footfall. The Turner Contemporary is estimated to have injected £70 million into the local economy between 2011-19.
- **Contributes towards multi-functional high streets:** Trips to cultural destinations have many motivations, including artistic participation and

voluntary activity, and are combined with spending at nearby retail, hospitality, and leisure amenities.

New polling reported here finds that many people want the high streets' presence of culture to expand. Half of adults (50%) would like to see more cultural experiences on their high streets. This 50% rises to 54% among those aged 25 to 34 years of age and 57% among black Britons. An expanded cultural footprint can help high streets appeal to younger and more diverse patrons. According to this polling, while only 14% of UK adults expect to spend more time on high streets than pre-Covid-19, this rises to 25% among those aged 18 to 25 years of age. With younger people seemingly more willing than older people to spend time in public spaces, high streets should utilise culture to appeal to them.

Culture is much more dependent than retail on in-person experiences and should be coordinated with other high street uses. This coordination might involve events and space management, marketing, and place branding. There are a variety of mechanisms for bringing this coordination, such as: Business Improvement Districts, Cultural Compacts,³ government funds, including Future High Streets Fund, Stronger Towns Fund, Town deals, Historic High Streets Heritage Action Zones, and associated cultural programme that also contribute to opportunities to coordinate and deliver culture on high streets.

Our brief and approach

Arts Council England commissioned BOP Consulting in June 2021 to undertake a rapid evidence review on the impact of culture on high streets. The next four chapters of this report present the results of a thematic literature review undertaken in response to this commission. These chapters also present relevant results from polling commissioned to support this research and a series of case studies,⁴ which are presented in more detail in subsequent chapters.

¹ This is according to figures compiled by the Local Data Company (LDC) for the accountancy firm PWC and reported in *The Guardian*, 14 March 2021.

² This relates to National Portfolio Organisations (NPOs), Sector Support Organisations (SSOs) and Music Education Hubs (MEHs). NPOs are leaders in their areas, with a shared responsibility to protect and develop England's national arts and cultural ecology. SSOs are a range of organisations working across all art forms supported by Arts Council England. MEHs are groups of organisations that work together to create cooperative music education provision.

³ These are partnerships designed to enhance the contribution of the cultural sector to local economic and social development, with an emphasis on cross-sector engagement beyond the cultural sector itself and the local authority. See BOP Consulting, *Review of Cultural Compacts Initiative*, 2020.

⁴ All six case studies were supported by the £1.57 billion Culture Recovery Fund and come from a geographically dispersed set of places across England.

1. Culture: High Street Presence

“High streets are a crucial part of our communities and local economies,” the government notes. “We recognise that changing consumer behaviour presents a significant challenge for retailers in our town centres”.⁵ Increased use of online retail is central to these changing consumer behaviours. Covid-19 has accelerated this use of online retail. In-store sales at high street clothing retailers, for example, fell 80% during the height of the pandemic and remained 25% below pre-crisis levels in August 2020.⁶

Declining retail on high streets

The increased use of online retail during Covid-19 has coincided with the closure of high street stores. Gap, Topshop, Debenhams, Oasis, Warehouse, Karen Millen, and Laura Ashley have all disappeared from the high street in the past 18 months, while Marks & Spencer, Next, House of Fraser and John Lewis have reduced their store estate. More than 17,500 chain store outlets closed on high streets in 2020.⁷

Persistence of culture on high streets

The contraction in high street retail contrasts with the persistence in the high street presence of culture. Due to support such as the £1.57 billion Culture Recovery Fund, most cultural organisations that entered the Covid-19 pandemic continue to be in operation as we emerge from it. The extent of the high street presence of culture in England is revealed by a survey⁸ of the Arts Council’s regularly funded organisations, which found:

- 75% of buildings used by National Portfolio Organisations (NPOs),⁹ Sector Support Organisations (SSOs)¹⁰ and Music Education Hubs (MEHs)¹¹ are either on or within a five-minute walk (500m) of a high street in England
- 90% of buildings used by NPOs, SSOs and MEHs are either on or within a 15-minute walk (1500m) of a high street in England
- 33% of buildings used by NPOs, SSOs and MEHs are located on high streets in England
- 24% of buildings used by Creative People and Places (CPPs)¹² are located on high streets in England
- 64% of buildings used by CPPs are either on or within a five-minute walk (500m) of a high street in England
- 49% of visual arts buildings used by NPOs, SSOs and MEHs are located on high streets in England and 86% are within a five-minute walk (500m) of a high street
- 39% of theatres used by NPOs, SSOs and MEHs are located on high streets in England and 82% are within a five-minute walk (500m) of a high street
- 18% of museums used by NPOs, SSOs and MEHs are located on high streets in England and 63% are within a five-minute walk (500m) of a high street.

⁵ HM Treasury, *Our Plan for the High Street, Budget 2018*. An updated High Streets Strategy was published by the government on 15 July 2021 at the same time as a speech by the Prime Minister on levelling up.

⁶ Rhys Dalglish for ONS, *How the Covid-19 Pandemic has accelerated the shift to online spending*, 18 September 2020.

⁷ This is according to figures compiled by the Local Data Company (LDC) for the accountancy firm PWC and reported in *The Guardian*, 14 March 2021.

⁸ Arts Council England, *Data Report: Arts Council-funded Cultural Infrastructure*, June 2020

⁹ National Portfolio Organisations are leaders in their areas, with a shared responsibility to protect and develop England’s national arts and cultural ecology.

¹⁰ Sector Support Organisations are a range of organisations working across all art forms supported by Arts Council England.

¹¹ Music Education Hubs are groups of organisations that work together to create cooperative music education provision. They respond to local needs, with each hub fulfilling its objectives as set out in England’s National Plan for Music Education.

¹² Creative People and Places (CPP) is an Arts Council England programme that develops parts of the country where levels of involvement in arts and culture are significantly below the national average. CPP projects must include community groups and/or grassroots organisations working in partnership with larger cultural organisations.

2. High Street Footfall and Spend

If high streets are just transactional (i.e. places to spend money), they are at greater threat of online retail contributing to high street closures. Where these closures occur, they can create a downward spiral – the closures reduce footfall, which reduces the viability of the remaining outlets.

If high streets are experiential (i.e. places that provide enjoyable experiences), they are more likely to be able to resist competition from online retail. The Stronger Towns Fund and the Future High Streets Fund are government schemes that have sought to assist high streets in being experiential.

Footfall as an indicator of high street vitality

Footfall is a key indicator of the extent to which people enjoy spending time on a high street and its vitality and viability. Even before Covid-19, footfall was declining. Between 2015 and 2020 there has been a 5% decline in high street footfall – a trend accelerated by Covid-19, with major cities seeing footfall drop by 76% on average in the period 1 March 2020 to 30 June 2020.¹³

Many cultural activities require in-person settings, which drive footfall. While cultural organisations have utilised digital technology to maintain engagement during Covid-19, cultural activities significantly depend upon in-person contact. Live music and theatre, for example, are typically much more enjoyed in-person than digitally. In addition, many features of art galleries, museums and libraries must be experienced in-person, not digitally.

Culture as a driver of high street footfall and spend

These in-person experiences bring positive experiences to high streets and the necessity of in-person settings contrasts with retail that transacts hassle-free

online. The footfall resulting from these experiences is recognised by business. “*The Business Improvement District (BID) values culture,*” the Executive Director of Winchester BID has said, “*because (it can) encourage visitors to explore venues they may not have necessarily found without these wonderful programmes – be that a shop, restaurant or quirky attraction, and so in turn it boosts spend in the economy*”.¹⁴

This partnership between culture, as a generator of positive experiences and footfall, and other amenities (e.g. retail and hospitality), which benefit from spending resulting from this footfall, is consistent with academic research that sees multi-functionality as being key to the success of high streets. “*Multi-functional centres draw people in for a much wider ‘bundle of benefits’ than just shopping,*” researchers at Manchester Metropolitan University have found.¹⁵

There is evidence from across the country that culture drives footfall and spending:

- Vauxhall One¹⁶ created Summer Screen, a programme of free open-air screenings in an underused open space, which attracted over 7,000 visitors in its first year – a sharp increase in footfall.¹⁷
- See No Evil, a street art project in Bristol, turned a derelict thoroughfare into a tourist attraction, with footfall increased by 75% and enquiries about vacant premises increased by 70%.¹⁸
- 92% of visitors to Lincoln’s Great Magna Carta weekend say that the festival inspired them to return to the city, with 18% of visitors to the festival spending over £100 on retail and hospitality in the city.¹⁹

Similarly, the Derby Partnership Scheme in Conservation Areas (PSiCA) report that while average footfall on high streets dropped by around 26% between

¹³ High Streets Task Force, *Review of High Street Footfall July 2019-June 2020*

¹⁴ King’s College London on behalf of Arts Council England and Mayor of London, *Improving Places – Culture and Business Improvement Districts: Thriving Partnerships*, 2017

¹⁵ Steve Millington, Nikos Ntounis, Cathy Parker and Simon Quin, *Towns and Cities as Multifunctional Centres*, 2015

¹⁶ This is the Business Improvement District (BID) covering Vauxhall, London. Summer Screen first occurred in 2013.

¹⁷ Wavehill, *Arts and Place Shaping: Evidence Review*, 2020

¹⁸ Mayor of London, *Culture on the High Street*, 2013. This source is not clear over what period these increases occurred.

¹⁹ King’s College London on behalf of Arts Council England and Mayor of London, *Improving Places – Culture and Business Improvement Districts: Thriving Partnerships*, 2017

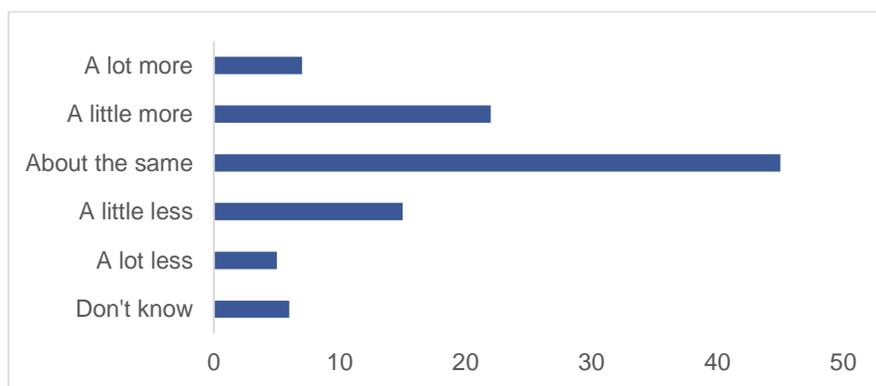
2008 and 2013, the Derby PSiCA areas saw footfall grow between 12% to 15% in the same period.²⁰ The High Streets Heritage Action Zone programme, which is being delivered by Historic England and includes a cultural programme, seeks to grow high street footfall in equivalent ways elsewhere.

New polling on the future of culture on high streets

As part of this research, new polling was commissioned on the future of high streets and culture's role in this. This polling was undertaken by Deltapoll between 25 and 30 June 2021 and is based upon a representative sample of 3,838 adults in the UK.

Figure 1 shows the response options provided when given the prompt, "To what extent would you expect to see more or less cultural and leisure opportunities over the next few years?", 29% of UK adults expect to see more cultural and leisure opportunities in the next few years.

Figure 1 Expectation of local high street cultural and leisure opportunities over coming years compared to pre-Covid-19 (% of respondents, all UK adults)



Source: Deltapoll

²⁰ Historic England, *Heritage and the Economy*, 2019. The Derby PSiCA focuses on heritage, which can complement cultural activities and both heritage and culture can enable places to be distinctive and appealing.

Successful cultural organisations can bring large numbers of consumers to their local high street. **ARC Stockton Arts Centre** brings 110,000 visitors per year to its local high street through a combination of arts programming, creative learning, and space hire. A strong cultural offering can also bring new business to local high streets. Thirty-five per cent of **Theatre Royal Plymouth's** visitors in 2018/19 were attending the venue for first time, with many travelling from across Devon and beyond to do so.

For some high streets, cultural organisations are among the most prominent local attractions. Thirty-two per cent of the footfall to Derby city centre is to visit a cultural institution, such as **Derby QUAD**, or to attend a cultural event. Arts programming at **Heart of Glass**, and other cultural and heritage institutions, combines with local retail to drive visitors to St Helens each year.

As cultural organisations grow more established, they often help to deliver sustainable economic development to their local high street. **Turner Contemporary** has supported or safeguarded at least 100 retail jobs on the Margate high street through an increase in footfall and spending. This sustainable growth is frequently fuelled by consumer loyalty among the local population. A quarter of the residents in Newcastle-under-Lyme visit the **New Vic Theatre** at least once a year.

3. Civic Pride

“People feel real civic pride in their towns,” according to recent focus group research, “but that pride is dented when their towns are in decline.”²¹

Closure of high street retail contributes to this sense of decline. This is because high streets, argues a recent article, “define the character and identity of our towns and neighbours. They are spaces that should bring us together and engender civic pride”.²² High streets that are exclusively places to spend money are at risk of decline and failing to build this civic pride. Culture makes high streets more than places to spend money and – especially when deployed in effective partnership with other amenities – can retain local vibrancy, footfall, and pride.

Evidence on culture driving civic pride

Surveying of Great Place²³ projects indicates that it has helped to build civic pride:²⁴

- 13 of 16 Great Place projects report that local pride has increased
- 15 of 16 Great Place projects report that people feel a greater sense of belonging to a place
- 11 of 16 Great Place projects report that people feel their community has been brought together

The capacity of culture to build local pride is recognised by business. For example, it was due to “the role of arts and culture in bringing different people

together and celebrating local pride in such a diverse area” that the Luton BID successfully applied to Arts Council England’s Luton Investment Programme.²⁵

Local people also appreciate culture’s capacity to build civic pride. For example, Creative Black Country (CBC) in the West Midlands has benefitted from cultural placemaking projects.²⁶ The event fostered “a sense of pride in some of the regulars” of the pubs that were part of this project and a “high level of comradery and excitement” in the local community.²⁷

Culture and heritage can build civic pride by deepening understanding of localities. Previous surveying has revealed that 83% of residents who had visited heritage sites or projects in their area agreed that visiting had helped them understand more about the history of their area.²⁸

The Grimsey Review into the future of high streets was updated in 2020 and recommended, “creating spaces for civic and social use – and encouraging better quality streets, spaces and “third spaces”, popular with local people and visitors”.²⁹ Cultural organisations provide such spaces and help to build local community spirit and pride in doing so.

Cultural participation can have a significant positive effect on civic pride among children and young people. A recent academic study found that children who engage with cultural organisations are 58% more likely to volunteer for those and other local cultural institutions in adulthood, and 78% more likely to donate to those organisations as they grow up.³⁰

Drawing upon original polling undertaken to support this research, Figure 2 shows the response options provided when given the prompt, “cultural experiences on my high street or in my nearest town centre give me a sense of pride about my local area.” Sixty-two per cent of UK adults agree that cultural

²¹ Public First, *Town Centres and High Streets, Survival and Revival*, 2020

²² Vidhya Alakeson, ‘How to fix the High Street’ in *Prospect*, July 2021

²³ The Great Place scheme is a joint initiative between Arts Council England and Heritage Lottery Fund that aims to pilot new approaches to putting culture at the heart of communities and local policy making.

²⁴ BOP Consulting, *Arts Council England and Heritage Lottery Fund Great Place Programme Evaluation (England), Year One Report*, 2018

²⁵ King’s College London on behalf of Arts Council England and Mayor of London, *Improving Places – Culture and Business Improvement Districts: Thriving Partnerships*, 2017

²⁶ Creative Black Country (CBC) is a partnership between Dudley Council for Voluntary Service, Sandwell Voluntary Council, Wolverhampton Voluntary Service Council, One Walsall, Multistory, Black Country Touring and the Black Country Living Museum to increase local engagement with arts in the Black Country area.

²⁷ Research referenced in Creative People and Places, *Art in Unusual Locations case study*, 2017

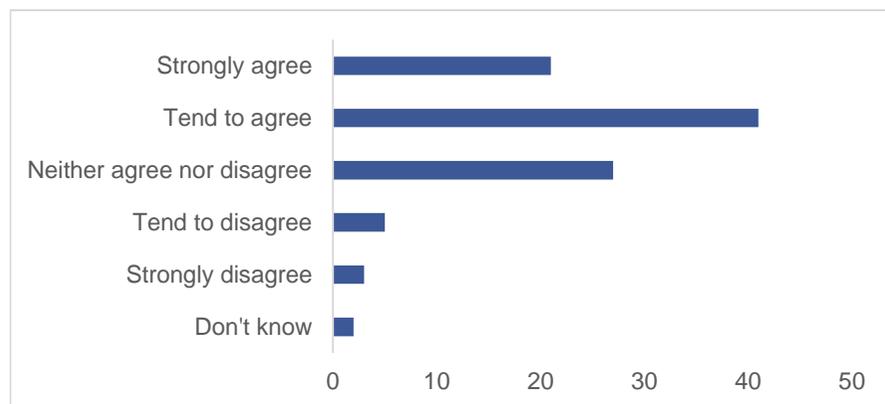
²⁸ Research referenced in Historic England, *Heritage and Society*, 2018

²⁹ The Grimsey Review 2, 2020

³⁰ Brian Garrod and David Dowell, *The Role of Childhood Participation in Cultural Activities in the Promotion of Pro-Social Behaviours in Later Life*, 2020

experiences on the high street give them a sense of pride about their local area. The added feelings of local pride are slightly higher among those in the North (68%) and Midlands (67%), women (65%), those aged 55-64 (66%) and the over 65s (65%).

Figure 2 Cultural experiences on the local high street or nearest town centre give local pride (% of respondents, all UK adults)



Source: Deltapoll

How culture drives civic pride

This evidence suggests cultural organisations build civic pride through a range of channels, including:

- Those that involve limited direct engagement by residents, e.g. the **intrinsic pride** of knowing the cultural asset is a part of their place
- Those that involve direct engagement by residents, e.g. **pride in community** through activities with other residents, and **pride in place** by better understanding of it

- Those that involve the organisation’s activities with other entities, e.g. creating a **multifunctional high street that prevents a spiral of pride-reducing decline**.

The Cultural Development Fund (CDF) has been launched by the government in January 2019 to use investment in heritage, culture and creativity as a catalyst for regeneration. Grimsby, Thames Estuary, Plymouth, Wakefield and Worcester benefitted from £20 million of funding at that time. This kind of investment helps high streets be multifunctional and be sources of pride for residents.

The influence of cultural organisations can raise the overall level of local pride in an area. Ninety per cent of Stoke-on-Trent residents felt an increase in civic pride after engaging with the **New Vic Theatre’s** Appetite community programme. Three-fifths of those living in Margate reported “an increase in community pride” thanks to the presence of **Turner Contemporary**.

This increase in local pride can have direct benefits for the high street. The proportion of Stockton-on-Tees residents who “*cited a liking for the town centre*” rose from 69% in 2011 to 83% in 2016, in line with **ARC Stockton Arts Centre’s** objectives. While many factors impact the extent to which Stockton-on-Tees residents like their town centre, contingent valuation analysis has isolated the contribution of **Theatre Royal Plymouth** to local pride and found it to be unusually high.³¹

Local pride and external perceptions often complement each other. Local pride in the cultural offering of **Heart of Glass** and other institutions in St Helens led to the town becoming the Liverpool City Region’s first Borough of Culture. **Derby QUAD** has enhanced local pride and external perceptions through celebrity partnerships. It has recruited successful local patrons from the city, including Jack O’Connell and Hetain Patel.

³¹ Arts Council England: Regional Galleries and Theatres Benefit Transfer Report, 2021

4. The Post-Pandemic High Street

The first Grimsey Review (2013) remains an important resource on the future of high streets. It provides three overarching conclusions: high streets as multifunctional hubs; the need for government action; and the importance of local authority plans, visions, and partnership working. In this section, we refocus (around culture's role in the future of high streets) and update (around the post Covid-19 context) these conclusions.

The high street as a multifunctional hub

Multifunctional high streets re-establish them as hubs for social connection and celebrate their roots and unique character. Recent surveying sees tomorrow's city centre as fulfilling many roles: a place to meet friends (91%); and a place to go for arts and culture (83%).³²

Covid-19 has strengthened the case for the high street as a multifunctional hub. *"The high streets of the future,"* claims a KPMG report on the post Covid-19 world, *"will need to become multi-purpose locations, combining retail and hospitality amenities with residential, education, healthcare, cultural, technology, community and more ... The pandemic has made it essential for places to galvanise their centres for the new way of living"*.³³

The need for government action

Government action, especially the Culture Recovery Fund, helped preserve the cultural sector through Covid-19. These organisations now need to be adequately resourced to grow in a new context and to fulfil culture's role on multifunctional high streets.

Local plans, visions and partnership working

Multifunctional high streets require, according to academic research, *"all stakeholders to work together much more effectively to deliver a better collective experience in location"*.³⁴ Cultural organisations are collaborators³⁵ and Cultural Compacts are a new organising device for collaboration between cultural organisations and other local partners.³⁶

In developing multifunctional high streets, some focuses of collaboration suggested by the literature are:

- **Events and space management:** "Local authorities should establish events teams to manage a comprehensive programme of activities," according to the Grimsey Review 2 (2020), which will assist, "by driving footfall to local high streets".³⁷ There is a case for more joined-up management of space between cultural organisations, local authorities and local communities – while, on the one hand, cultural organisations can provide spaces to be used by community groups, these organisations might also expand their footprints to programme more activities on high streets.
- **Marketing:** "Establish marketing partnerships with local cultural and tourism agencies," is one action suggested for Business Improvement Districts, "to attract new audiences, improve visibility and develop place-branding".³⁸
- **Place branding:** This utilises local culture in articulations of what makes the place distinctive. The importance of place branding has been demonstrated across the country – in, for example, Lincoln's use of its heritage assets, Altrincham's positioning as "a modern market town",³⁹

³² Southern Policy Centre, *Re-imagining Tomorrow's City Centre*, 2020

³³ KPMG, *The Future of Towns and Cities post Covid-19*, 2021

³⁴ Steve Millington, Nikos Ntounis, Cathy Parker and Simon Quin, *Towns and Cities as Multifunctional Centres*, 2015

³⁵ For example, at the end of the first year of the Great Place scheme, 53% of projects were working with relevant Local Enterprise Partnerships (LEPs) and 35% with local Business Improvement Districts (BIDs). See BOP Consulting, *Arts Council England and Heritage Lottery Fund Great Place Programme Evaluation (England), Year One Report*, 2018

³⁶ These are partnerships designed to enhance the contribution of the cultural sector to local economic and social development, with an emphasis on cross-sector engagement beyond the cultural sector itself and the local authority. See BOP Consulting, *Review of Cultural Compacts Initiative*, 2020

³⁷ The Grimsey Review 2, 2020

³⁸ These partnerships have been successfully formed by BIDs, including in Norwich. See King's College London on behalf of Arts Council England and Mayor of London, *Improving Places – Culture and Business Improvement Districts: Thriving Partnerships*, 2017

³⁹ Altrincham's Public Realm Strategy.

and the development of Stratford-upon-Avon's connections to Shakespeare.

Drawing on new polling undertaken for this research, Figure 3 shows the response options provided when given the prompt, “over the next few years, when compared to before the Covid-19 pandemic, would you expect to spend...”. Just over half of UK adults (51%) expect to spend the same amount of time on local high streets or in the nearest town as pre-Covid-19. Nearly a third (28%), however, expect to spend less time in these places – which presents a significant challenge for high streets. It may be that compensating footfall and spending can be generated by the 14% that expect to spend more time on high streets. With this 14% rising to 25% among those aged 18 to 24 years of age, those that anticipate increased high street use are disproportionately young.

Figure 3 Expectation of local high street or nearest town centre use over coming years compared to pre-Covid-19 (% of respondents, all UK adults)

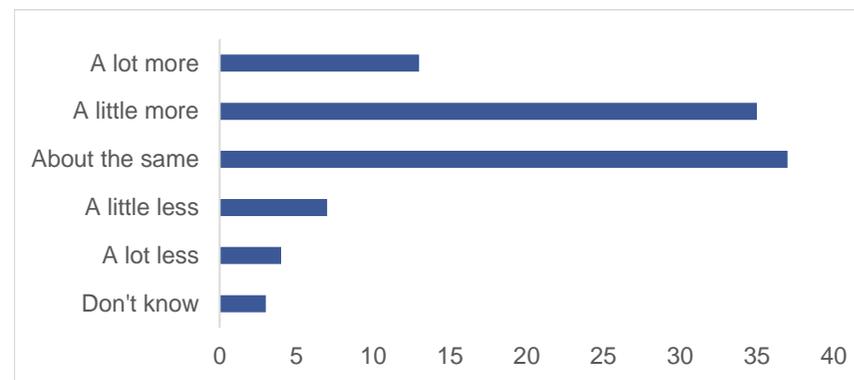


Source: Deltapoll

Figure 4 shows the response options provided when given the prompt, “To what extent would you like to see more or less cultural and leisure opportunities over the next few years?” Almost half of UK adults (48%) would like to see more cultural and leisure opportunities on the high street in the next few years.

A further 37% of UK adults are satisfied with the current levels of cultural and leisure opportunities in the area. The wish for greater access to culture and leisure on the local high street received cross-generational support, although was slightly higher among women (59%) and 18-to-24-year-olds (55%).

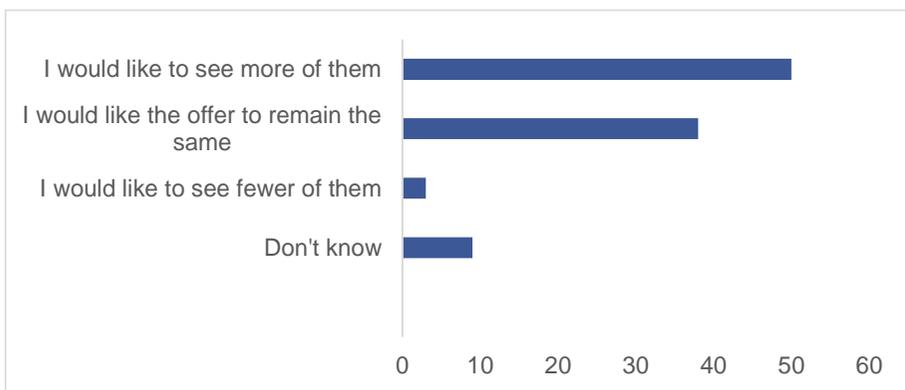
Figure 4 Desire for local high street cultural and leisure opportunities over coming years compared to pre-Covid-19 (% of respondents, all UK adults)



Source: Deltapoll

Figure 5 shows the response options provided when given the prompt, “Which of the following best describes your feelings about cultural experiences on your high street or in your nearest town centre?” Half of adults (50%) would like to see more cultural experiences on their high street or in their nearest town centre. This 50% rose to 54% among 25-to-34-year-olds. More black Britons (57%) express support for more cultural expressions.

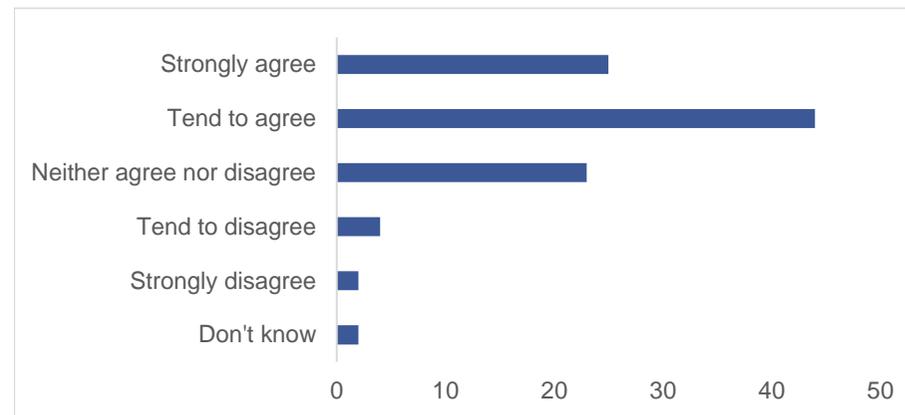
Figure 5 Attitudes on local high street cultural experiences over coming years (% of respondents, all UK adults)



Source: Deltapoll

Figure 6 shows the response options provided when given the prompt, “Cultural experiences on my high street or in your nearest town centre make my local area a better place to live.” More than two thirds of UK adults (69%) agree that cultural experiences on the high street make their local area a better place to live. This perception was highest among women (73%), those aged 55-64 (71%) and the over 65s (73%).

Figure 6 Cultural experiences on local high street or nearest town centre make local areas better places to live (% of respondents, all UK adults)

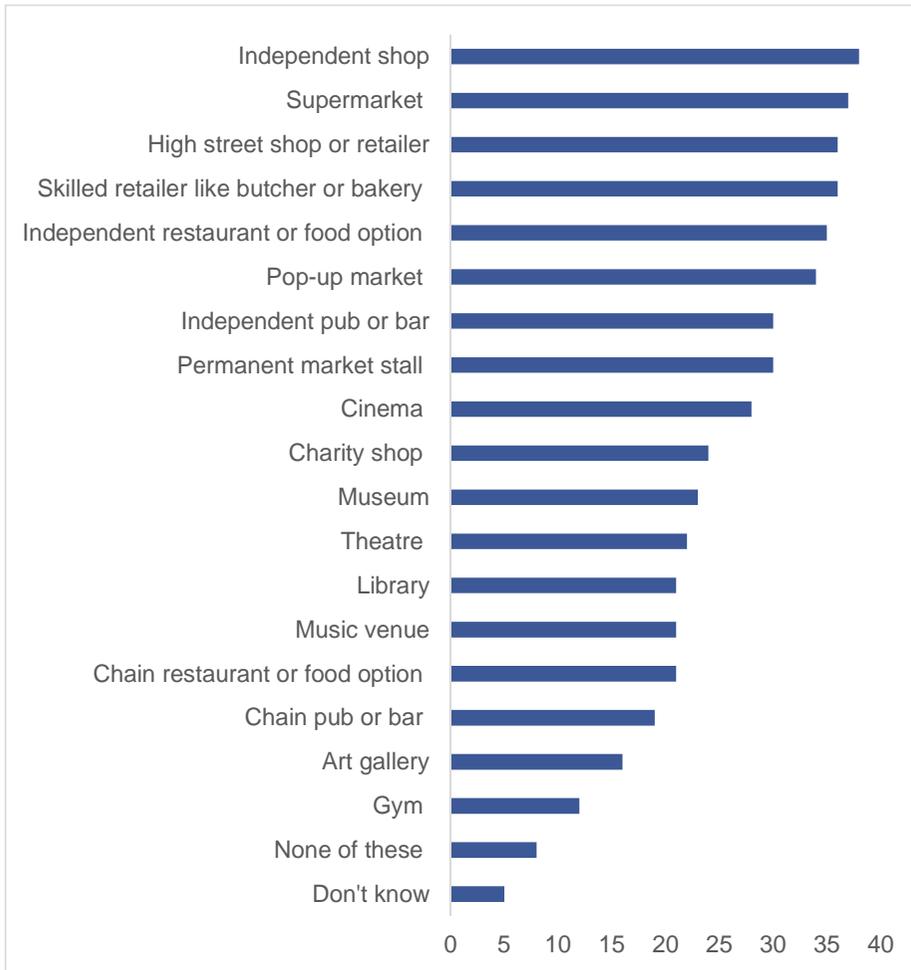


Source: Deltapoll

Figure 7 shows the response options provided when given the prompt, “Which of the following would make you more likely to visit in future?” The most popular high street activities for UK adults on their local high street are: visiting big brand and independent retailers; shopping in supermarkets; and going out to independent bars and restaurants.

Cultural attractions make people more likely to want to visit their local high street or town centre – with the figure below showing that cinemas, museums, theatres, libraries, music venues and art galleries all make some people more likely to make these visits.

Figure 7 Preferences for visiting local the high street or nearest town centre over coming years (% of respondents, all UK adults)

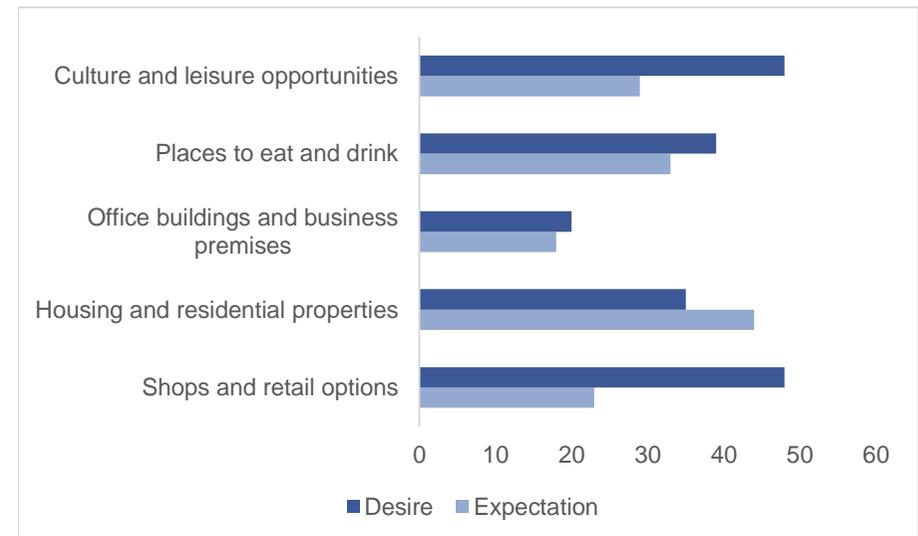


Source: Deltapoll

Figure 8 shows that when asked what they expect to see more of on their local high streets over the next few years, only 29% of people said that they expect to see more culture and leisure opportunities. Conversely, 33% of people expect to see places to eat and drink and 44% of people say they expect to see more housing and residential.

A greater proportion of the UK population want to see more culture and leisure opportunities (48%), the same proportion as want to see more shopping and retail options, but fewer wish to see more housing and residential properties on their local high street (35%). These figures indicate that what people want to see on their high streets is not what they think they expect to see.

Figure 8 Desire and expectations of local high streets or nearest town centre over coming years (% of respondents, all UK adults)



Source: Deltapoll

5. Case Studies

5.1 Derby QUAD



Credit: In situ at QUAD, photograph by Charlotte Jopling. Mosaic image of *The Lovers* by Luisa Magdalena and Nahuel Alfonso and inspired by René Magritte's painting *Les Amants*. Photo mosaic created and installed by The People's Picture.

Derby QUAD is an international centre for contemporary art and independent film, based in Derby, that opened in 2008. The city's historic Cathedral Quarter has been reinvigorated by the centre and it has sparked an increase in popular independent retailers and cafes on the high street. Derby Quad is an Arts Council England National Portfolio Organisation and has also received funding from the government's Culture Recovery Fund.

How does Derby QUAD impact footfall on the high street?

Derby QUAD welcomed 3.5 million visitors between its opening in 2008 and 2021.⁴⁰ QUAD's visitor surveys reveal that the centre has attracted a broad range of visitors, with footfall split between University of Derby students, other residents of the city, and art enthusiasts from the wider East Midlands region and beyond.⁴¹

QUAD is a key cultural institution in Derby and culture is a key driver of visits to the city. Thirty-two per cent of visitors to the city travel there to visit a cultural institution or event.⁴²

How does Derby QUAD influence spending on the high street?

Derby QUAD's economic impact analysis found that the venue had directly contributed £20 million to the local economy of Derby since it opened in 2008.⁴³

QUAD's formal links to businesses in the Cathedral Quarter help increase dwell time and spend on the high street. The arts centre belongs to Derby's Cathedral Quarter BID loyalty scheme, which offers customers 10-20% discounts in the area's other independent retailers, cafes, restaurants, bars, arts and cultural venues and historic landmarks.⁴⁴

How does Derby QUAD foster local civic pride?

“ I describe us kind of as a 'Community Centre 2.0'. A community centre of the future.

Adam Buss, CEO of Derby QUAD

Famous patrons for the QUAD include the actor Jack O'Connell and the artist Hetain Patel. The achievements of these locals are used to encourage engagement with the QUAD.

⁴⁰ Derby QUAD website, 2021

⁴¹ REF Impact Case Study, 2014

⁴² Visit Derby, *Developing Derby as a Visitor Destination: 2020/2025*

⁴³ Derby QUAD website, 2021

⁴⁴ Derby Cathedral Quarter website, 2021

How does Derby QUAD contribute to place-making and place-branding strategies?

“ We do co-production of events and activities, so that there is a genuine conversation with audiences.

Adam Buss, CEO of Derby QUAD

Derby QUAD takes a leadership role in the place-branding strategy through its annual #ThisIsDerby events. Working with the Derby Opportunity Area, the project promotes Derby as a socially mobile city. #ThisIsDerby is run in collaboration with Derby County Community Trust, Derby's Cultural Education Partnership and Derby Sport Forum.⁴⁵

Derby QUAD contributes to place-making for Derby through its commitment to sharing commercial opportunity in its local supply chains. Eighty per cent of the food and drink sold in QUAD's café is sourced from suppliers in Derbyshire.⁴⁶

How can Derby QUAD assist the high street's recovery from Covid-19?

Commitments to emerging and digital technologies have allowed Derby QUAD to engage with patrons throughout the Covid-19 pandemic. QUAD was aided by the receipt of £367,000, over two rounds, from the Culture Recovery Fund. Part of these funds has been used to develop an online wellbeing programme to foster ongoing engagement with Derby's Cathedral Quarter BID group and to regenerate the high street post-pandemic.⁴⁷

5.2 Turner Contemporary



Credit: Oasthouse Archive

Turner Contemporary is an art gallery which opened in 2011 in Margate, and which celebrates the town's connection with the English Romantic painter JMW Turner. The Turner Contemporary has been awarded funding from the government's Culture Recovery Fund as well as being one of Arts Council England's National Portfolio Organisations. The vibrancy of Margate's high streets has since improved, as the gallery has allowed the town to emerge as one of the leading cultural destinations in the South East.

How does Turner Contemporary impact footfall on the high street?

Turner Contemporary received 3.6 million visitors between its opening in 2011 and 2021.⁴⁸ In 2017, tourism in Thanet, Margate's local authority, increased by

⁴⁵ This is Derby website, 2021

⁴⁶ Derby QUAD Annual Report, 2016-17

⁴⁷ Derby QUAD website, 2021

⁴⁸ Turner Contemporary website, 2021

9.2% from 2015. In 2017, 4.2 million people visited the area, with Turner Contemporary cited as one of the main attractions.⁴⁹

The gallery was responsible for bringing new visitors into Margate who would not otherwise have visited the town. A survey in the gallery's 2016 Social Value Report found that 48% of visitors to Margate travel for the specific purpose of visiting Turner Contemporary.⁵⁰

How does Turner Contemporary influence spending on the high street?

Turner Contemporary's social value analysis determined that more than 100 retail jobs on Margate's high street had been either supported or safeguarded by spending by its visitors. In 2015/16, the net additional visitor-related expenditure was estimated at £7.8 million.⁵¹

As a result of the gallery, local retailers have reported feeling an increased "entrepreneurial spirit" and positivity about each retailer's ability to help to "regenerate Margate".⁵² Between 2011 and 2019, Turner Contemporary injected £70 million into the wider Kent economy.⁵³

How does Turner Contemporary foster local civic pride?

“ Turner Contemporary has transformed Margate. It has changed Margate. There are a lot of people who feel it has provided ambition and aspiration.

Victoria Pomery, Director of Turner Contemporary

The gallery conducted exit surveys with visitors who were residents of Margate, to gauge their opinions of the Turner Contemporary's impact on local pride.

⁴⁹ Thanet Visitor Research: Secondary Research Report, 2018

⁵⁰ Turner Contemporary, *Art Inspiring Change: Social Value Report*, 2016

⁵¹ Turner Contemporary, *Art Inspiring Change: Social Value Report*, 2016

⁵² Turner Contemporary, *Art Inspiring Change: Social Value Report*, 2016

⁵³ Turner Contemporary website, 2021

⁵⁴ Turner Contemporary, *Art Inspiring Change: Social Value Report*, 2016

Fifty-nine per cent of respondents agreed or strongly agreed that "Turner Contemporary enhances the sense of community in the Margate area". An even higher proportion of respondents, 90%, felt that "Turner Contemporary is good for the Margate image".⁵⁴

How does Turner Contemporary contribute to place-making and place-branding strategies?

“ Turner Contemporary has been the catalyst for the social and economic regeneration of Margate and East Kent.

Victoria Pomery

Turner Contemporary is a place-making asset for Margate because it increases awareness of Margate and builds positive associations with the town.⁵⁵ The gallery's Social Value Report 2016 reported that Turner Contemporary and the *Margate Old Town* had contributed £6.6 million in Advertising Value Equivalent (AVE)⁵⁶ for Margate during 2015/16, with £21.4 million in AVE raised between 2011 and 2016.⁵⁷

How can Turner Contemporary assist the high street's recovery from Covid-19?

Over the past decade, Margate has emerged as a culture-led destination, within easy reach of London and well-placed to attract visitors keen to enjoy leisure time in the UK. The gallery has been assisted in its ability to contribute to this by receiving over £100,000 from the Culture Recovery Fund, which is being used, in part, to establish new business models that will contribute to long-term sustainability in Margate.⁵⁸

⁵⁵ Thanet District Council submitted a £6.3 million bid to the government's Levelling Up Fund to further "enhance the town centre, making it more attractive to residents, visitors and businesses". Thanet District Council, 2021

⁵⁶ Advertising Value Equivalent is a measure of the advantage that an organisation would derive from media coverage of a Public Relations campaign against the potential cost benefit of a budgeted advertising campaign.

⁵⁷ Turner Contemporary, *Art Inspiring Change: Social Value Report*, 2016

⁵⁸ Turner Contemporary Press Release, 2020

5.3 New Vic Theatre



Credit: Burslem Light Night - Appetite Stoke on Trent. Sense of Unity, Activate's touring production featuring Dundu and Worldbeaters Andrew Billington Photography.

The New Vic Theatre is a successful producing theatre based in Newcastle-under-Lyme, Staffordshire. The venue opened in 1986 as Europe's first purpose-built theatre-in-the-round. The theatre and its Creative People and Places project, Appetite, outreach events in Hanley (Stoke-on-Trent) and Newcastle-under-Lyme have rebranded both high streets as cultural destinations in North Staffordshire. The New Vic Theatre receives funding from Arts Council England as a

National Portfolio Organisation. It is also a project partner for the Creative People and Places project, Appetite, which also receives funding from Arts Council England. The New Vic Theatre also received government support through the Culture Recovery Fund.

How does New Vic Theatre impact footfall on the high street?

The New Vic Theatre received 178,880 visitors during 2019/20.⁵⁹ In 2011, a survey of leisure habits in Newcastle-under-Lyme revealed that 24.8% of the town's population had visited the theatre at least once during the year.⁶⁰

The New Vic also engaged with 20,833 people in its first year through its Appetite programme, which provides cultural and educational activities in the communities of Stoke-on-Trent and Newcastle-under-Lyme.⁶¹ This programme will run until 2023. The most popular Appetite programme is the annual "Big Feast"⁶² which attracted 15,495 participants and increased footfall to Hanley's high street (in Stoke-on-Trent) by 20% above the typical weekend average.⁶³

How does New Vic Theatre influence spending on the high street?

The New Vic Theatre participated in an economic impact study of the West Midlands theatre industry to determine its own economic footprint. In 2005, the theatre generated a combined visitor spend of £1.3 million, or £12.50 per visitor, for the local economy.⁶⁴ In the time since, these figures will have increased.

⁵⁹ New Vic Theatre, Annual Review 2019-20

⁶⁰ Newcastle-under-Lyme, Retail and Leisure Study 2011

⁶¹ New Vic Theatre, Annual Review 2019-20

⁶² The Big Feast is an annual free festival of arts and performance featuring local artists, held over the August bank holiday weekend.

⁶³ New Vic Theatre, Annual Review 2019-20

⁶⁴ Herefordshire Council. Economic impact study of West Midlands theatre. 2005.

How does New Vic Theatre foster local civic pride?

“ We are a force for positive change. Not only by creating brilliant theatre in the round, but also by giving local people the opportunity to see great art.

Gemma Thomas, Director of Appetite

The theatre conducted an audience feedback survey in 2019 to determine the local community's perceptions of the Appetite programme run by the New Vic. Ninety per cent of respondents “felt an increase in community pride” because of this form of engagement with the theatre.⁶⁵

How does New Vic Theatre contribute to place-making and place-branding strategies?

“ The theatre's team and board are interested in how arts and culture, and the theatre, can be part of that bigger picture and can add to the vibrancy of the area.

Gemma Thomas

The Appetite programme allows the New Vic Theatre to influence place-making strategies on Hanley's⁶⁶ high street. Two-thirds of the £3 million budget for the project was spent in the local economy between 2013 and 2019, creating new jobs and a fixed presence for Appetite in the area.⁶⁷

Stoke City Council cited the New Vic Theatre's community engagement programme as a significant element in the re-branding of the city.⁶⁸ The programme was considered a major factor in bringing new “inward investment”, “shop openings” and “hotel developments” across the city of Stoke-on-Trent.⁶⁹

⁶⁵ Local Government Association website, 2019

⁶⁶ The city of Stoke-on-Trent consists of six historic towns, each with its own main retail district: Burslem, Fenton, Hanley, Longton, Stoke-upon-Trent and Tunstall.

⁶⁷ Local Government Association website, 2021

How can New Vic Theatre assist the high street's recovery from Covid-19?

The New Vic, having secured £248,990 from the Culture Recovery Fund, is committed to developing safe, socially distanced shows both within the theatre and in the local community.⁷⁰ Through its Appetite, Borderlines and education programme, the mixed partnerships have bolstered the theatre's community engagement over the last decade.

5.4 ARC Stockton Arts Centre



Credit: Little Cog

ARC Stockton Arts Centre, which opened in Stockton-on-Tees in 1999, is a charity that uses arts and culture to support the local community in both Stockton and the wider Tees Valley. The town has been rejuvenated by

⁶⁸ Newcastle-under-Lyme will receive £23.6 million from the government's Stronger Towns Fund in 2021, which is predicted to increase the town's GVA by £69 million.

⁶⁹ Local Government Association website, 2021

⁷⁰ New Vic Theatre, Annual Report 2019-20

ARC's role in bringing consumers back to its high street. ARC Stockton Arts Centre is also one of Arts Council England's National Portfolio Organisations. The organisation has also been supported by the government's Culture Recovery Fund.

How does ARC Stockton impact footfall on the high street?

ARC Stockton typically engages with over 110,000 visitors per year through its artistic programme, creative learning activities and local businesses who hire varied spaces within its building.⁷¹

ARC is one of the most popular destinations in Stockton-on-Tees for cinema attendance. Twelve per cent of cinema trips by Stockton residents are taken to ARC, bringing footfall back into the high street against the challenge of out-of-town cinemas.⁷²

How does ARC Stockton influence spending on the high street?

ARC Stockton contributes to an increase in spending for the Stockton-on-Tees high street. A 2021 economic impact study indicated that the venue generates around £4.5 million each year for Stockton's local economy.⁷³ ARC's strategy for increasing local high street spending includes co-promotion with local retailers such as the independent Drake bookshop.⁷⁴

How does ARC Stockton foster local civic pride?

In 2016, 83% of residents in Ipsos MORI's five-yearly survey "*cited a liking for the town centre*", up from 69% in 2011.⁷⁵ While many factors might explain this trend, it aligns with ARC Stockton's aspirations for the town.

⁷¹ ARC Stockton Arts Centre Annual Review, 2020

⁷² Stockton on Tees, Town Centres Uses Study, 2016

⁷³ Creative Industries Council website, 2021

⁷⁴ Stockton-on-Tees Borough Council received £16.5 million from the Future High Streets Fund (FHSF) to further develop the local high street.

“ Our whole purpose is about increasing local pride, raising aspirations, and raising ambitions.

Annabel Turpin, Chief Executive of ARC

How does ARC Stockton contribute to place-making and place-branding strategies?

As a result of the increased influence of both ARC and the annual International Riverside Festival, these cultural institutions have helped reshape the place-making strategy of Stockton on Tees Borough Council. The council recently invested in an 11-person events support team to organise around 90 events annually.⁷⁶

Additionally, Annabel Turpin provides strategic leadership to the Local Enterprise Partnership (LEP), and ARC Stockton's Operations Manager, Shaun Dowd, is chair of the local Business Improvement District (BID).

“ We were so lucky to work for a council that see arts and culture as a core part of how they regenerate the borough.

Annabel Turpin

How can ARC Stockton assist the high street's recovery from Covid-19?

ARC received two rounds of funding from the Culture Recovery Fund to help stimulate post-Covid 19 recovery.⁷⁷ ARC's flexibility in terms of its multiple spaces, dynamic programme, and proven adaptability to change enabled it to reopen as soon as restrictions allowed, immediately bringing people back to the town centre. Its trusted relationships with communities have played a vital role in giving people confidence to return.

⁷⁵ Grimsey Review, 2017

⁷⁶ Grimsey Review, 2017

⁷⁷ Arc Stockton Arts Centre website, 2021

5.5 Theatre Royal Plymouth



Credit: Steve Haywood

Since 1982, Theatre Royal Plymouth has been a largescale touring and producing venue at the West End of Royal Parade in Plymouth City Centre, Devon. The economy of Plymouth has greatly benefitted from the theatre. Theatre Royal Plymouth regularly brings first-time visitors to the area and has the third largest economic footprint of any theatre in the UK. Theatre Royal Plymouth receives funding from Arts Council England as one of their National Portfolio Organisations and it also received an award from the government's Culture Recovery Fund.

How does Theatre Royal Plymouth impact footfall on the high street?

Theatre Royal Plymouth has encouraged greater footfall to the high street by bringing new patrons to the area each year. In 2018/19, nearly 324,000 trips to the theatre were made to watch shows, roughly 35% of whom were first time visitors.⁷⁸

How does Theatre Royal Plymouth influence spending on the high street?

The theatre's own economic impact assessment revealed that Theatre Royal Plymouth contributed almost £36 million to the economy of Plymouth, Devon and Cornwall.⁷⁹

An Arts Council England study of the economic impact of all UK theatres in 2012 revealed that Theatre Royal Plymouth had the third highest impact of all 541 theatres in the UK at the time. The only institutions that had a greater impact were The National Theatre in London and the Royal Shakespeare Company (RSC) in Stratford-upon-Avon.⁸⁰

How does Theatre Royal Plymouth foster local civic pride?

“ We play a significant role in Plymouth's cultural identity and the incredible support we have had from people across the South West during the pandemic is a real indicator of the pride people have in the organisation.

Dylan Tozer, Director of Audience and Communications

A WTP analysis⁸¹ of Theatre Royal Plymouth revealed that residents of Plymouth have greater levels of pride in their local theatre relative to the norm for theatres in the UK. Plymouth residents who had visited the theatre were willing to pay 11.1% above the mean average for attendance, while those who

⁷⁸ Theatre Royal Plymouth Annual Review, 2018

⁷⁹ Theatre Royal Plymouth Annual Review, 2018

⁸⁰ BBC Website, 2012.

⁸¹ Willingness to pay, or WTP, is the maximum price a customer is willing to pay for a product or service.

had never visited Theatre Royal Plymouth were willing to pay 10.3% above the mean to financially support the theatre.⁸²

How does Theatre Royal Plymouth contribute to place-making and place-branding strategies?

“ Theatre Royal Plymouth is a cornerstone of a vibrant city centre and proud to be the principal home for the performing arts in the region.

Dylan Tozer

Theatre Royal Plymouth is an anchor institution in its part of the city centre and an important player within a sector of high economic value to the city. The GVA per employee⁸³ in the creative and cultural industries in Plymouth is £69,000, well above the £49,770 average for the city.⁸⁴ Plymouth’s post-war heritage buildings and organisations have a significant impact on local placemaking. These institutions on the high street have been boosted by a £2 million investment from Historic England’s Heritage Action Zone programme, which will primarily be spent on redeveloping the Abercrombie estate.⁸⁵

How can Theatre Royal Plymouth assist the high street’s recovery from Covid-19?

Theatre Royal Plymouth received £1.9 million from the Culture Recovery Fund, and the theatre has used that support to engage with patrons and to bring them back to the theatre and its high street.⁸⁶

In the year to March 2021, Theatre Royal Plymouth provided workshops for 478 people as part of its Engagement and Learning project and the theatre hosted

online social events, such as the Funky Llama Club Night, to maintain engagement with the local community through Covid-19.

Theatre Royal Plymouth and other cultural organisations in Plymouth have been strengthened by the Cultural Development Fund to develop a long-term, sustainable cultural offer in Plymouth.⁸⁷ In addition, with a combination of the Culture Recovery Fund grant and the National Lottery funding, 16,000 people safely attended the theatre for 80 performances of three festive shows during the Christmas season.⁸⁸

5.6 Heart of Glass



Where Things Are Different, made with workers from industries past in St Helens and artist Stephen King. Image credit: Stephen King

⁸² Arts Council England, *Regional Galleries and Theatres Benefit Transfer Report*, 2021

⁸³ GVA (gross value added) is the value generated by any unit engaged in the production of goods and services. GVA per employee helps to compare industries of different sizes.

⁸⁴ *Culture Plan: A Place-based Culture Strategy for Plymouth, 2021-2030*

⁸⁵ Heritage England, *Plymouth High Street Heritage Action Zone*, 2020

⁸⁶ Plymouth Herald website, 2020

⁸⁷ Invest Plymouth, *Creative Digital City: iMayflower*, 2021

⁸⁸ Theatre Royal Plymouth website, 2021

Heart of Glass, based in St Helens, Merseyside, is a collaborative and social arts agency. The organisation's remit is to work with artists and community groups, young people, asylum seekers and refugees, LGBTQ+ people, disabled people, older people, and members of marginalised communities to conduct creative workshops, exhibit new work, stage live art shows and organise arts festivals in St Helens. Heart of Glass receives funding from Arts Council England as both a National Portfolio Organisation and as a Creative People and Places project. Heart of Glass were also awarded funding from the government's Culture Recovery Fund.

How does Heart of Glass impact footfall on the high street?

Heart of Glass helps to generate footfall on the St Helens high street by producing arts and cultural activity in external spaces within the community. The institution created 565 workshops, events and projects between 2014 and 2020, primarily in the town centre of St Helens.⁸⁹ St Helens has developed a heritage strategy that recognises the importance of heritage to driving visits to the town, with this strategy noting that heritage was responsible for 28 million visits to North West in 2018.⁹⁰

How does Heart of Glass influence spending on the high street?

Heart of Glass works with the local Bold Forest Park Area team to promote socially conscious spending among visitors to the area. The Bold Forest Park Area Action Plan concluded that the partnership was a “*significant environmental, heritage and cultural asset*”.⁹¹

How does Heart of Glass foster local civic pride?

“ Civic consciousness is something that is very much part of our work.

Patrick Fox, Director of Heart of Glass

The influence of Heart of Glass on local perceptions of St Helens has been significant. Alongside the St Helens Libraries Cultural Hub, it was instrumental in helping St Helens to become the first Borough of Culture for the Liverpool City Region.⁹²

The institution helps to foster higher levels of civic pride among the people of St Helens by engaging the local population in community-building activities. The Your Name Here project received 500 submissions from local residents and explored themes of “*citizenship, history, family and civic pride*”.⁹³

How does Heart of Glass contribute to place-making and place-branding strategies?

“ We have forced the issue, to think about what a functioning town centre might look like, and how we can create different entry points for people.

Patrick Fox

There is a perception within the council that “*outside of the borough, the only organisation that is known is Heart of Glass*”.⁹⁴ The council is working with Heart of Glass to leverage this profile to improve perceptions of St Helens and the attractiveness of the town.

⁸⁹ St Helens Town Investment Plan

⁹⁰ St Helens Borough Heritage Strategy, 2019

⁹¹ Bold Forest Park Area Action Plan, 2017

⁹² Bold Forest Park Area Action Plan, 2017

⁹³ Heart of Glass website, 2021

⁹⁴ St Helens Borough Council website, 2021

How can Heart of Glass assist the high street's recovery from Covid-19?

The commitment of Heart of Glass to engaging and uplifting marginalised communities in St Helens was strengthened by its receipt of £150,000 from the Culture Recovery Fund.⁹⁵ During the first Covid-19 lockdown, Heart of Glass launched “Home Work”, which commissioned local artists to produce work around the theme of care. The institution also created a “Care Map” for 2020, to illuminate the most useful places for vulnerable residents to receive support.⁹⁶

⁹⁵ In Your Area website, 2020

⁹⁶ Heart of Glass website, 2021

BOP Consulting

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