VIBRANT SHROPSHIRE

Independent by nature

2021-2031

Cultural Strategy for Shropshire

Developed in partnership by

Shropshire Council

Appendix 1

The Cultural Sector in Shropshire: Key Metrics

September 2020

Prepared by the Information, Intelligence & Insight Team

3i Information Intelligence & Insight Team

Employment in the Cultural Sector and its Impact on the Economy

- The cultural sector is important to Shropshire not just because it enriches the quality of life for its residents and visitors, it is also a vital contributor to the County’s economy.
- The sector is broad, capturing activities in:

  Creative industries

  Tourism

  Sport & Leisure
- Official statistics, though useful, underplay the size of the sector as small organisations tend not to be captured. Although there are some large organisations in the cultural arena in Shropshire, many are small, some are seasonal and a high proportion depend on volunteers rather than employees. Whilst these may not be included within official data and are therefore hard to quantify, there is not doubt that they make a significant contribution to the cultural offer from an economic perspective.
- Notwithstanding this, the sector supports 15,000 jobs which are captured by official data (15,750 when sole proprietors are included), 2,380 organisations and generates a value in gross value added (GVA*) terms of an estimated £432 million.
- This means that at least 12% of employment in Shropshire can be classed as cultural, with the sector contributing around 7% to the overall economy.

* GVA is a means of measuring the contribution to the economy made by producers or sectors. It is the difference between the value of goods and services produced and the cost of raw materials and other inputs which are used in production.

Impact of Covid-19

The impacts of the Covid-19 pandemic have been far-reaching, affecting the population's physical, mental and financial wellbeing. Restrictions on the population's movement and behaviour has also cause societal change, some of which may not revert to pre-pandemic norms once restrictions are relaxed.

Physical & Mental Wellbeing

- Nationally, there have been 4,228,898 confirmed positive cases of coronavirus, with 124,797 deaths (up to 07/03/2021).
- In Shropshire, there have been 14,595 cases and 602 fatalities*.
- Despite the obvious threat to health that Covid-19 poses, indirectly the impact on the nation's physical health is far-reaching:
    - Long term impact of long Covid-19 not yet fully understood
    - Impacts on other health issues, due to hospital capacity or public reluctance to seek help
    - Health consequences related to economic hardships associated with the pandemic
- Mental health has also arisen as an important issue during the pandemic – 48% of people say that it has impacted on wellbeing (ONS, 2020). Amongst many others, factors which will have negatively impacted mental health include:
    - Bereavement
    - Isolation
    - Loss of Income
    - Fear
- Levels of physical activity may also have reduced due to the closure of gyms and leisure centres, restrictions on group sports and the need to shield/self-isolate. This will impact on both physical and mental wellbeing.

* Please note: Coronavirus figures correct as at 07/03/2021 and will change

Economic Impact

- The fiscal consequence of the pandemic is forecast to reach £394 billion (Office for Budgetary Responsibility) and this will impact public finances for many years into the future.
- Gross Domestic Product (GDP) contracted by just under a tenth in 2020 (ONS), and although GDP and GVA (gross value added) are not directly comparable, a contraction on a similar scale for Shropshire amounts to some £620 million.
- Despite extensive use of the Coronavirus Job Retention Scheme across the country unemployment has soared, especially in April and May 2020 when the nation was first in lockdown. Unemployment is projected at 5-11% for 2021/22 (Office for Budget Responsibility)
- Numbers claiming out of work benefits in Shropshire rose to more than 9,000 at its peak. Currently some 8,300 people are on the claimant count (January 2021) which remains more than twice as many as pre-pandemic levels.
- Retail footfall has seen unprecedented falls as shoppers stayed at home.

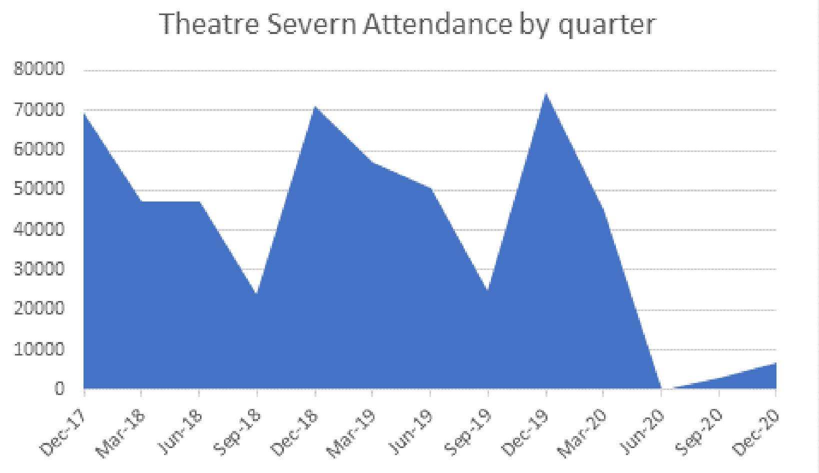
Societal Impact

- Increase in inequalities likely, although the Levelling Up Fund should redress this to some extent. Sector shutdowns, social distancing measures and school closures have disproportionately affected certain parts of the population, and the health impacts of the virus have not been evenly spread.
- Growth in home working – Shropshire has historically had a higher rate of home working than the national average, but numbers have increased to unprecedently high levels. Once restrictions have been lifted, some return to the office can be expected. However, increased use of technology to communicate and collaborate means that many workers may continue to work at home, at least on an occasional or part-time basis.
- Increased home working places increased demand on digital infrastructure and digital capability. 96% of households now have internet (ONS, 2020), but some remain digitally excluded - 50% of over 75s, 30% of 65-74s and 2% of households with children do not have access (OfCom, 2020)
- Increased use of the internet for shopping and entertainment – long-term impact on the High Street

Impact on the Cultural Sector

Despite the vibrancy of Shropshire's cultural sector, it has been profoundly impacted by the Covid-19 pandemic. Operators in the entertainment, leisure and hospitality industries were unable to trade for much of the year during 2020. Even when they were able to open, it was largely at reduced capacity due to social distancing regulations. Official statistics on the Coronavirus Job Retention Scheme (CRJS) released by HMRC show that nationally, more workers in accommodation & food services and arts and entertainment have been furloughed since the scheme began than in any other sectors. Across both sectors, more than half (55-56%) of those employed nationally were furloughed at the end of January 2021. This suggests that at least 6,100 Shropshire employments in the culture, leisure and tourism sector* were furloughed at this time. Around three in ten furloughed employments in the County fall within the cultural sector.

Visits to Shropshire attractions and leisure facilities have plummeted. Visits to Theatre Severn were down by around three-quarters in 2020 compared with 2019, the majority of visits taking place between January and March before the first national lockdown. Visits to libraries are similarly down (by two-thirds) and volunteering activities have also been severely reduced as the population abides by government regulations to stay at home.



In addition to the CRJS, other government interventions have been available to the sector, including:

- Bounce Back Loan Schemes
- Local restriction and discretionary grants
- Self-Employment Income Support Scheme
- VAT reduction from 20% to 5% for tourism & hospitality businesses

The Department for Digital, Culture, Media and Sport also announced a £1.57 billion Culture Recovery Fund rescue package in July 2020 aimed at helping the sector to survive and to safely reopen when appropriate.

*Based on approximately 11,000 jobs in the tourism and leisure classification in Shropshire in 2018

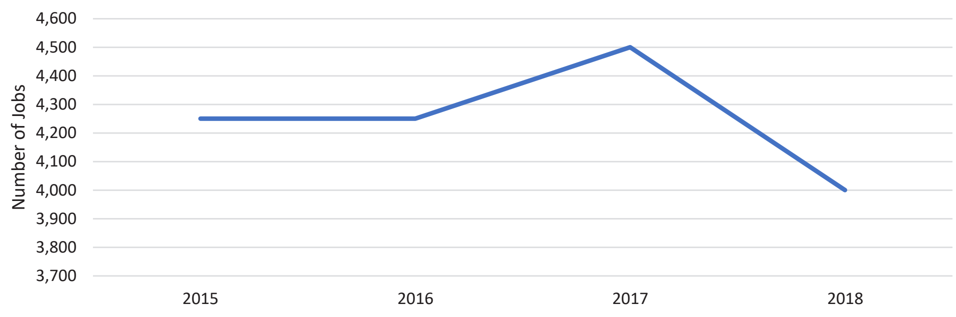
Creative Industries

Creative industries includes[1]:

Creative Industries
Media
Tech

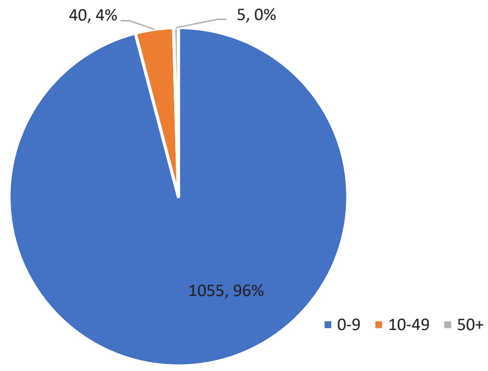
- Approximately 1,100 creative businesses (2019), employing 4,000 (2018)
- Number of creative jobs down by 250 (-5.9%) since 2015 (down from 4,500 in 2017)
- Number of businesses up slightly since 2015 (+55)
- In addition, approximately 250 self-employed/business owners in this sector who are registered for either VAT or PAYE taking total employment in the sector to 4,250
- There is likely to be a significant number of self-employed people earning below the VAT threshold who work in the creative industries who will not be captured by these figures
- Average size of business is small and reducing (3.6 employees on average in 2018/19)
- 96% of businesses have fewer than 10 employees
- Just 5 businesses employ 50 or more

Employment in the Creative Industries in Shropshire



Source: ONS, Business Register of Employment Survey, 2018, Crown Copyright©, 2020

Breakdown of Creatives Businesses by Size



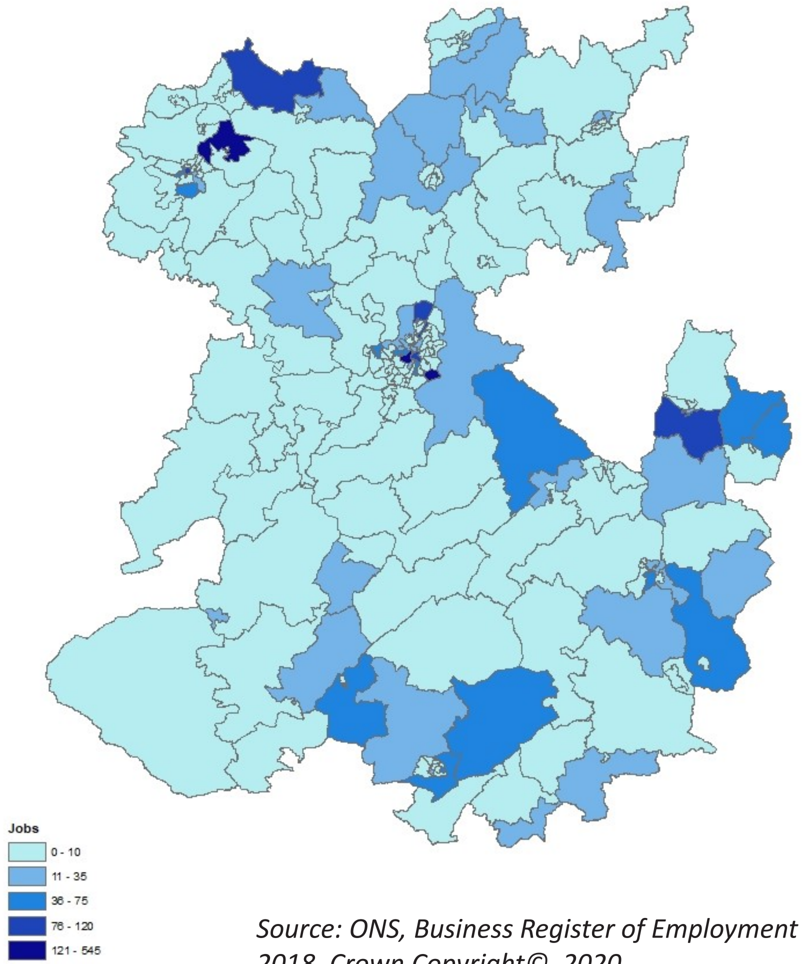
1 See Appendix A for complete list of SICs included within the definition of creative industries

Creatives Employment by Location

- Highest levels of employment in Shrewsbury & Oswestry
- As a percentage of total jobs, creatives most important in Albrighton (7% of all jobs) and Shifnal (5.4%), and least important in Pontesbury & Minsterley (0.6%)

Place Plan Area	Jobs	% of creative jobs	% of total jobs
Albrighton	150	3.7%	7.0%
Bishops Castle	70	1.7%	2.9%
Bridgnorth	300	7.4%	3.6%
Broseley	20	0.5%	2.3%
Church Stretton	80	2.0%	3.5%
Cleobury Mortimer	50	1.2%	3.3%
Craven Arms	120	3.0%	4.5%
Ellesmere	140	3.5%	3.6%
Highley	25	0.6%	2.8%
Ludlow	220	5.4%	3.3%
Market Drayton	110	2.7%	1.4%
Much Wenlock	40	1.0%	3.7%
Oswestry	600	14.8%	3.8%
Pontesbury & Minsterley	10	0.2%	0.6%
Shifnal	150	3.7%	5.4%
Shrewsbury	1,750	43.2%	3.5%
Wem	100	2.5%	2.4%
Whitchurch	120	3.0%	2.3%

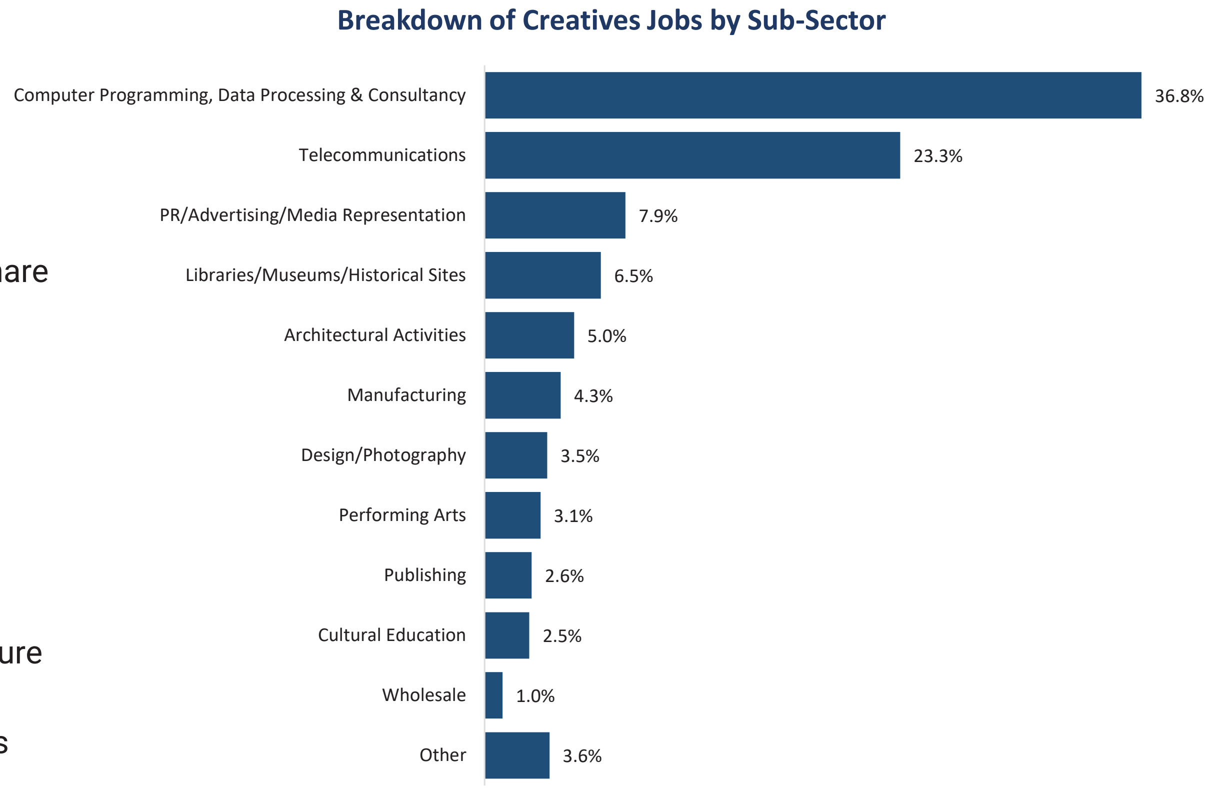
Employment in the Creatives Sector



Source: ONS, Business Register of Employment Survey, 2018, Crown Copyright©, 2020

Creatives Employment by Sub-Sector

- The creative industries includes a wide range of sub-sectors, ranging from technology through to performing arts.
- The highest proportion of jobs are in computer programming and data processing (36.8% or approximately 1,500 jobs.
- Telecommunications also account for a large share of the sector, at 23.2%.
- PR/advertising/media representation, libraries/museums/historical sites and architectural activities all account for between 5 and 10% of the sector
- Almost half of all businesses operating in the sector are in the computer sub-sector
- There are also significant numbers in PR/advertising/media representation (75), architecture (80) and design/photography (105)
- There are fewer telecommunications businesses (35), but these are larger which an average staff of 26 people

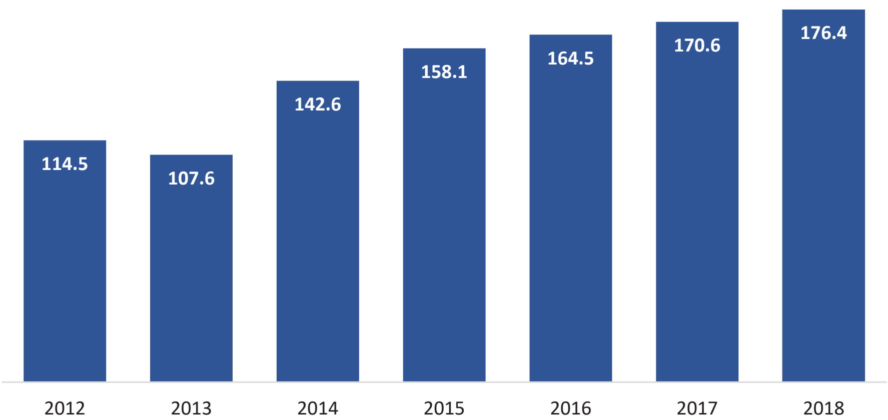


Source: ONS, Business Register of Employment Survey, 2018, Crown Copyright©, 2020
Please note that a high proportion of people working in the creative industries will not be captured by these sub-sectors

Gross Value Added[2]

- According to forecasts prepared by Oxford Economics, the value of the creatives sector in terms of GVA generation was £114.5 million in 2012, projected to reach £176.4 million in 2018.
- This is the equivalent of around 3% of the value of the Shropshire economy.
- Between 2012 and 2018, GVA generated by the creatives sector rose by 54% compared with growth of 14% within the total economy across all sectors

Growth in GVA: Creatives Sector in Shropshire



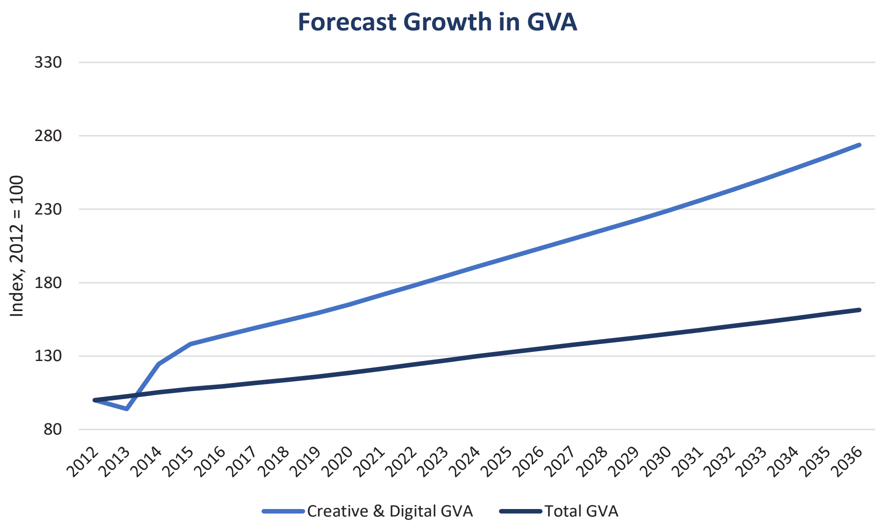
Source: Oxford Economic, 2012 baseline

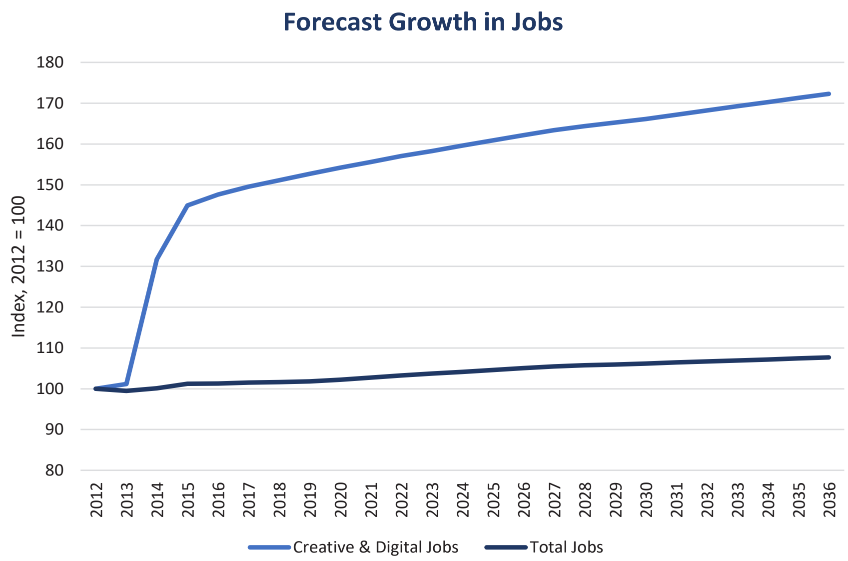
- Based on Oxford Economics data, each job in the creatives sector generates GVA to the value of £50,400.
- This is £7,015 more than the average per job across all sectors (+16% more)

2 GVA is a means of measuring the contribution to the economy made by producers or sectors. It is the difference between the value of goods and services produced and the cost of raw materials and other inputs which are used in production.

Creatives: Forecasts

- The value of the creatives sector is forecast to rise almost three times more quickly than the value of the total Shropshire economy between 2012 and 2036.
- Growth of 174% is projected, which will take GVA to £313.4 million.
- The contribution the creatives sector make to the economy will edge up to 3.4%
- Meanwhile, growth in the number of jobs will also exceed overall job growth (+72% compared with +7%).





Source: Oxford Economic, 2012 baseline
Please note that these forecasts were prepared before the Coronavirus pandemic, which will undoubtedly influence how the economy performs in the future across all sectors, including the creative industries

Visitor Economy

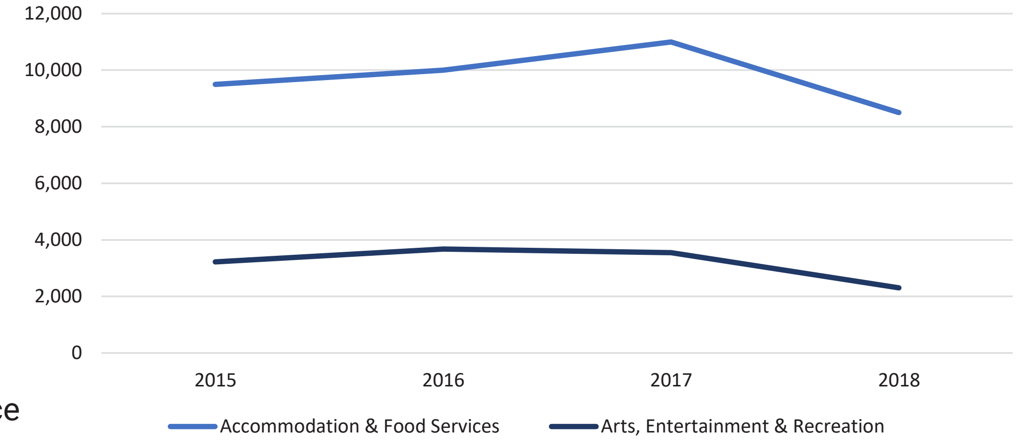
The visitor economy sector includes[3]:

Accommodation and food services
Arts, entertainment and recreation

- Approximately 1,280 tourism businesses (2019), employing 11,000 (2018)
- Number of visitor economy jobs down by 2,000 (-15.4%) since 2015 (down from 14,500 in 2017)
- Number of businesses up slightly since 2015 (+15)
- In addition, approximately 500 self-employed/business owners in this sector who are registered for either VAT or PAYE taking total employment to 11,500
- Average size of business is small and reducing (8.6 employees on average in 2018/19)
- 77% of businesses have fewer than 10 employees
- Just 5 businesses employ 250 or more, with an additional 25 employing between 50 and 250.

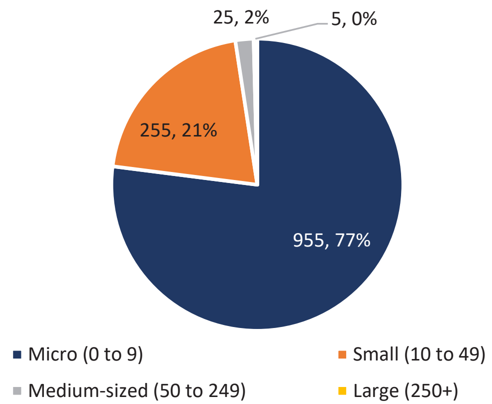
3 See Appendix B for complete list of SICs included within the definition of the visitor economy

Employment in the Visitor Economy in Shropshire



Source: ONS, Business Register of Employment Survey, 2018, Crown Copyright©, 2020

Breakdown of Visitor Economy Businesses by Size

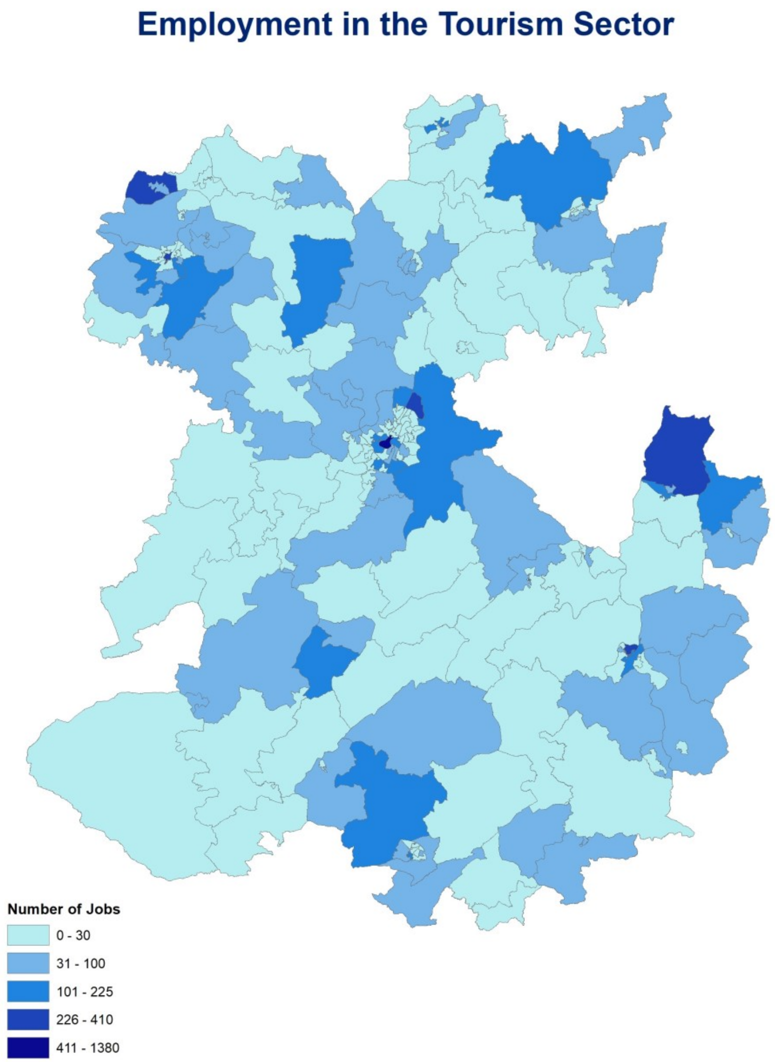


Source: ONS, Inter-Departmental Business Register, 2019, Crown Copyright©, 2020

Tourism Employment by Location

- More than a third of tourism jobs in Shrewsbury place plan area
- As a percentage of total jobs, tourism is a particularly important employer in Shifnal (26.6% of jobs) and Highley (16.9%)
- In contrast, tourism accounts for less than 8% of employment in Pontesbury/Minsterley, Wem, Ludlow, Broseley and Much Wenlock.

Place Plan Area	Jobs	% of tourism jobs	% of total jobs
Albrighton	230	2.1%	10.5%
Bishops Castle	200	1.8%	8.3%
Bridgnorth	920	8.4%	11.1%
Broseley	50	0.5%	5.8%
Church Stretton	250	2.2%	10.7%
Cleobury Mortimer	160	1.5%	10.5%
Craven Arms	310	2.8%	11.6%
Ellesmere	380	3.5%	9.7%
Highley	150	1.4%	16.9%
Ludlow	490	4.5%	7.4%
Market Drayton	680	6.2%	8.8%
Much Wenlock	90	0.8%	7.9%
Oswestry	1,470	13.4%	9.2%
Pontesbury & Minsterley	40	0.4%	2.5%
Shifnal	740	6.7%	26.6%
Shrewsbury	3,990	36.5%	8.0%
Wem	260	2.4%	6.2%

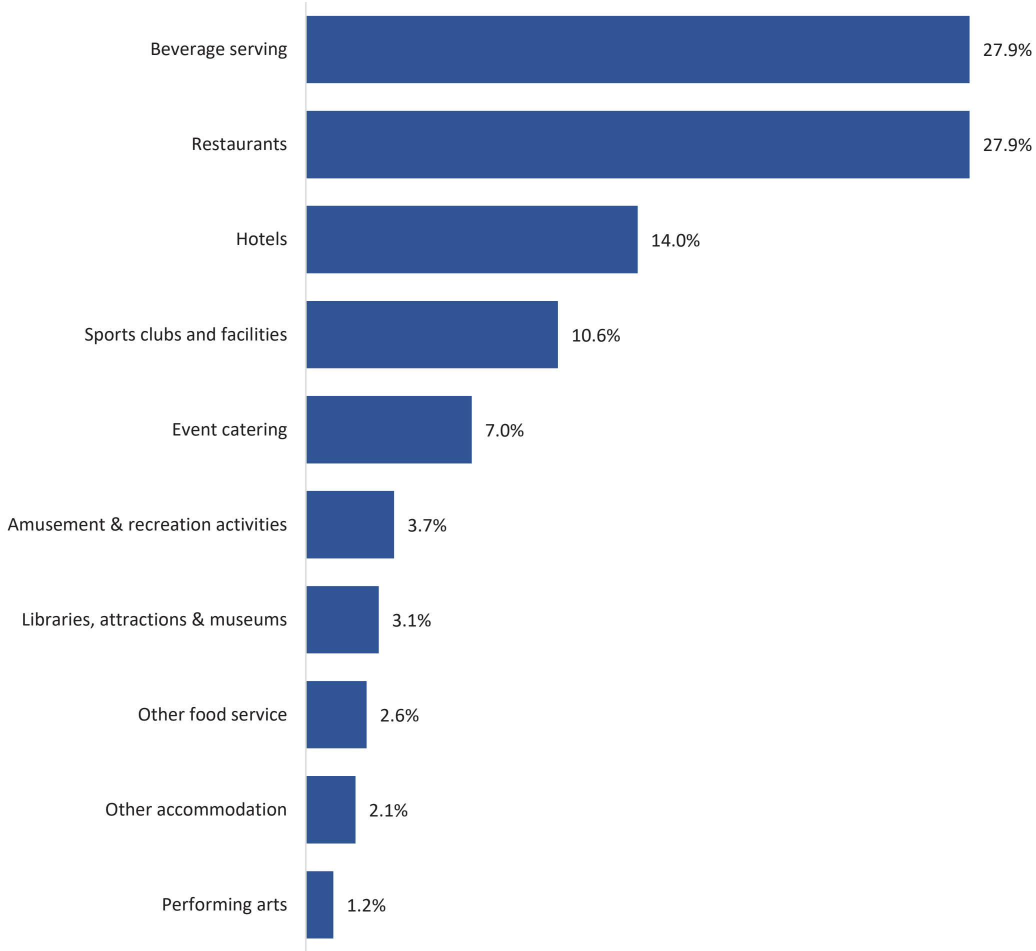


Source: ONS, Business Register of Employment Survey, 2018, Crown Copyright©, 2020
Note: Job count will be under-estimated in some Place Plan Areas where self-employment levels are high and where employment is more likely to be seasonal

Visitor Economy Employment by Sub-Sector

- The tourism sector includes jobs in a variety of sub-sectors ranging from accommodation and food services, visitor attractions to performing arts.
- More than three-quarters of employment is in accommodation and food services, with restaurants and beverage serving establishments (pubs and cafes) accounting for 27.9% of all jobs
- 14% of jobs are in hotels and guesthouses, with other types of accommodation accounting for 2.1% of jobs.
- More than a tenth of jobs are provided by sports clubs and facilities
- Amusement and recreational activities account for 3.7% of jobs, while 3.1% of sector jobs are attributable to libraries, museums and other visitor attractions
- In terms of business numbers, the highest number of operators are restaurants (435) and beverage serving establishments (350).

Breakdown of Visitor Economy Jobs by Sub-Sector

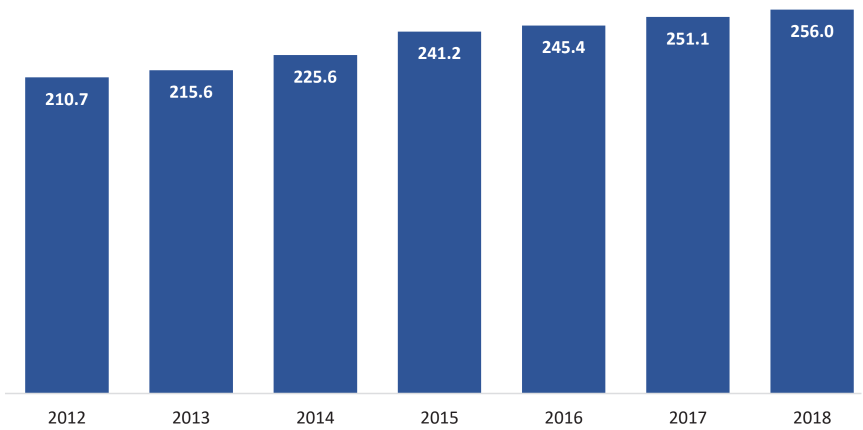


Source: ONS, Business Register of Employment Survey, 2018, Crown Copyright©, 2020

Gross Value Added[4]

- According to forecasts prepared by Oxford Economics, the value of the tourism sector in terms of GVA generation was £210.7 million in 2012, projected to reach **£256.0 million** in 2018.
- This is the equivalent of around 4% of the value of the Shropshire economy.
- Between 2012 and 2018, GVA generated by the creatives sector rose by 21% compared with growth of 14% within the total economy across all sectors
- Based on Oxford Economics data, each job in the tourism sector generates GVA to the value of £20,320.
- This is less than half of the value of the average per job across all sectors

Growth in GVA: Tourism Sector in Shropshire

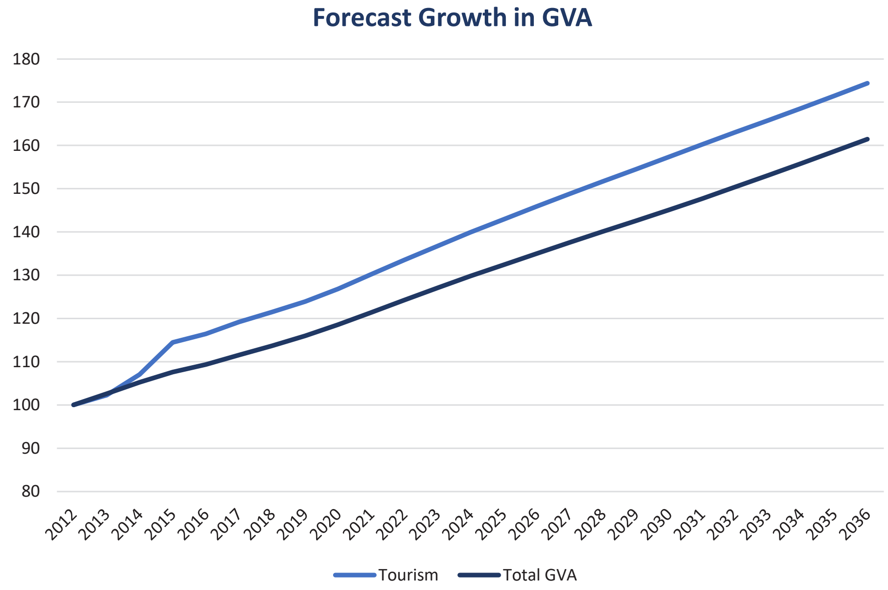


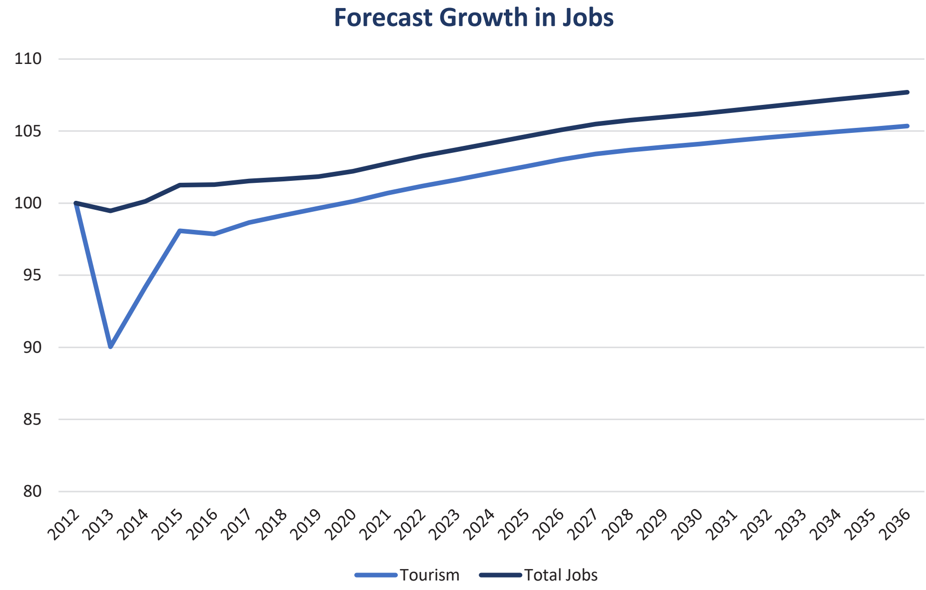
Source: Oxford Economic, 2012 baseline

4 GVA is a means of measuring the contribution to the economy made by producers or sectors. It is the difference between the value of goods and services produced and the cost of raw materials and other inputs which are used in production.

Tourism: Forecasts

- The value of the tourism sector is forecast to rise slightly quicker than the value of the total Shropshire economy between 2012 and 2036.
- Growth of 74% is projected, which will take GVA to £367.4 million.
- Meanwhile, growth in the number of jobs will fall below overall job growth (+5% compared with +7%).





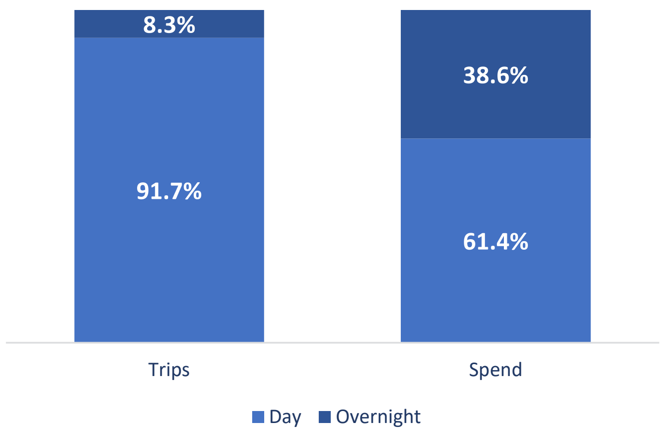
Source: Oxford Economic, 2012 baseline
Please note that these forecasts were prepared before the Coronavirus pandemic, which will undoubtedly influence how the economy performs in the future across all sectors, including the visitor economy

Shropshire as a Tourism Destination

- 13.11 tourism trips were made to Shropshire in 2018.
- This represents an increase of 2.6 million trips, which is the equivalent of 24.5% growth.
- Total visitor spend on these trips was £470.9 million.
- Spend rose by £57.9 million between 2016 and 2018 (+14%).

	Day	Overnight	Total
Trips	12.02	1.09	13.11
Spend	288.9	182.0	470.9

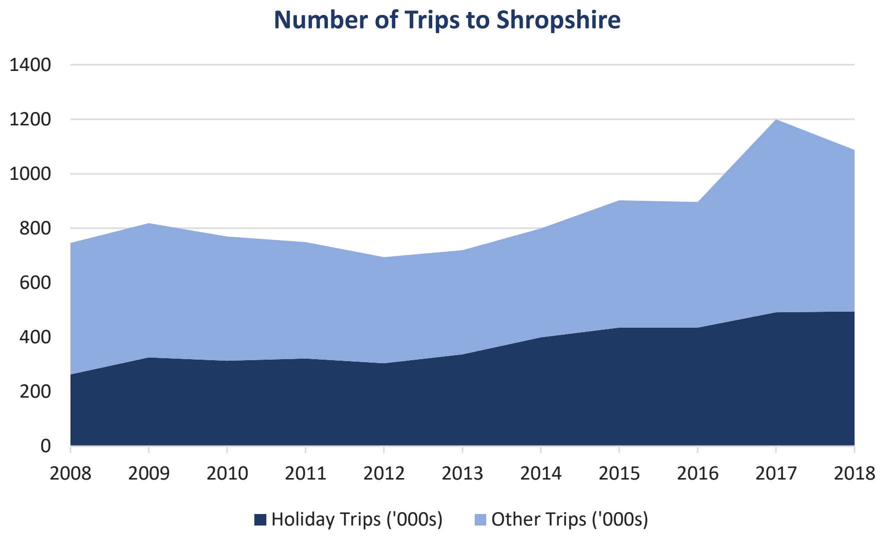
Breakdown of Tourism Visits and Spend by Type



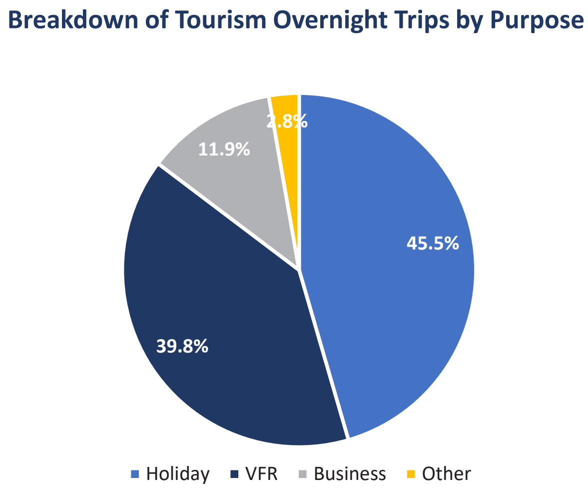
- More than nine out of 10 trips made to Shropshire are day trips.
- However, trips involving at least one overnight stay account for a much higher share of spend, at 61.4%,
- Average spend on a staying visit is around seven times higher than on a day trip. Even for a visit involving just one night away, spend is more than twice as high.
- Across both day and overnight visits, the average spend is £35.92. This has fallen by £3.30 since 2016 (+8.4%), primarily due to a notably rise in the volume of day trips to Shropshire.

Overnight Visits

- Total number of overnight trips to Shropshire in 2018: 1,088,000
- Number of trips has risen by 342,000, or by 45% over the last decade
- Holiday trips (i.e. those that involve staying in commercial accommodation) account for 45% of all trips (495,000 trips in 2018).
- The number of trips for holiday purposes has risen by 88% since 2008. Growth in the number of trips for all purposes has been much more muted at 23% over the 10 year period)
- A substantial number of trips made to Shropshire are to visit friends and relatives (VFR), with these accounting for almost four out of five trips in 2018.
- 12% of trips are for business purposes
- The total number of nights associated with tourism visits was almost 3.5 million in 2018, with the average length of stay 3.2 nights
- The average length of stay has increased from 2.6 nights in 2008
- The purpose of trip makes very little difference to the length of stay (holiday 3.2 nights, VFR 3.1 and business 3.3)



Source: Visit Britain

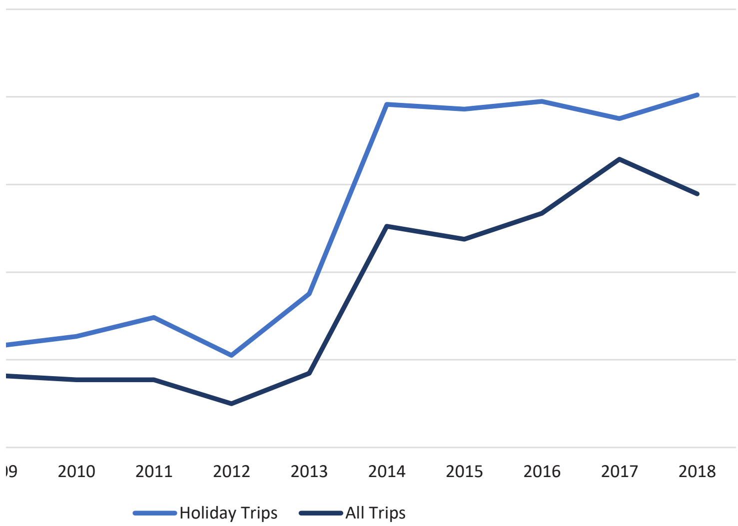


Based on rolling three year average (2018 figure reflects average of 2016, 2017 and 2018)

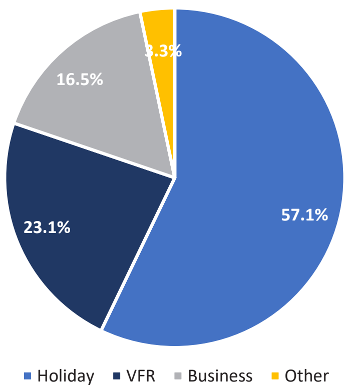
Overnight Trips – Visitor Spend

- Consumer spend on overnight visits to Shropshire rose by 125% in the 10 years to 2018 to reach £182 million.
- This is the equivalent of £167.28 per trip (£52.51 per night).
- Spend on holidays spent in commercial accommodation have risen more quickly than spend on trips overall (+181% to £104 million).
- Spend per trip is also higher for holidays than for trips overall at £210.10, which is the equivalent of £64.84 per person per night.
- Spend per trip for business purposes is highest while spend on VFR trips is notably lower.

Growth in Spend on Tourism Overnight Visits



Breakdown of Spend on Tourism Overnight Trips by Purpose



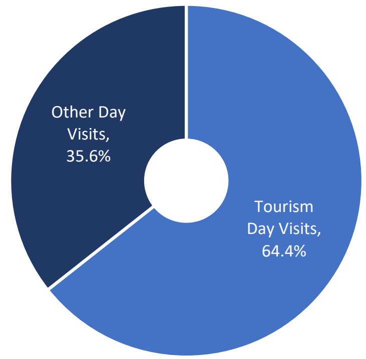
Total Spend	Spend per Trip	Spend per Night
£104 million	£210.20	£64.84
£42 million	£97.00	£31.77
£30 million	£232.74	£70.93
£6 million	£200	£53.25
£182 million	£167.28	£52.51

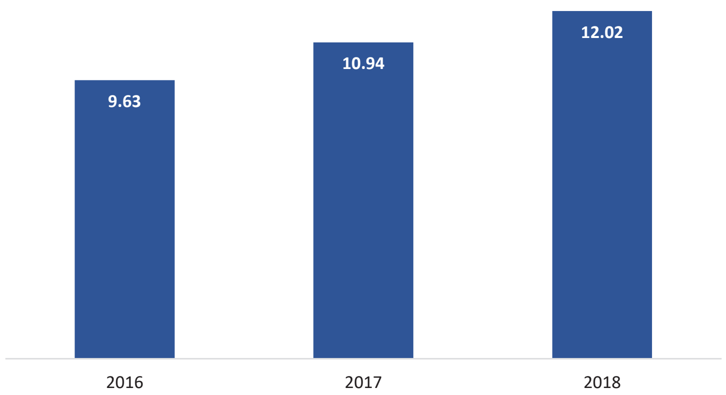
Source: Visit Britain

Day Visits

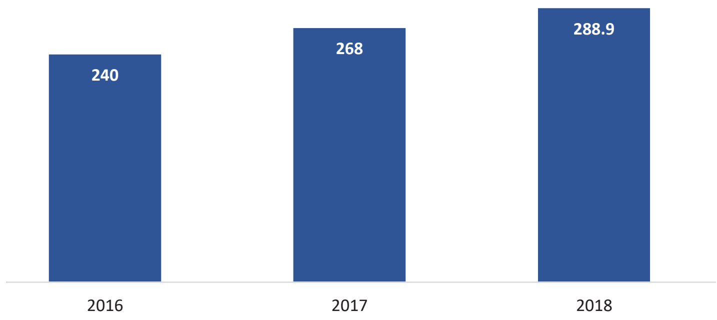
- The total number of leisure visits to Shropshire lasting for three hours or more (but not involving an overnight stay) stood at 18.67 million in 2018 [5].
- The majority of these are classed as tourism day visits (64.4%). These are trips that are not taken on a regular basis.
- The number of tourism day visits has risen by 2.39 million since 2016 to 12.02 million.
- This represents a rise of 25%.
- Consumer spend on day visits amounted to £413.7 million in 2018
- 70% (£288.9 million) is attributable to tourism trips

Breakdown of Day Visits by Type





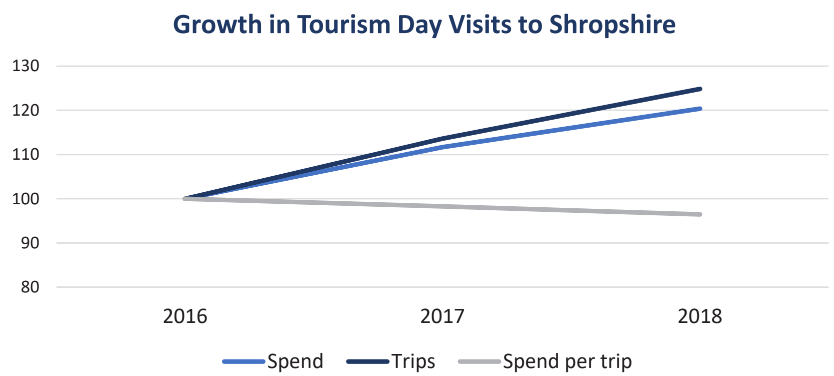
Spend on Tourism Day Visits (£ million)



Source: Visit Britain

5 I Based on rolling three year average (2018 figure reflects average of 2016, 2017 and 2018)

- The volume of tourism day visits rose by almost a quarter between 2016 and 2018
- Spend also rose, but not as quickly (+20%).
- This means that the average spend per trip has fallen, by 3.6% or by £0.89.
- Notwithstanding this, average spend on a tourism trip is £5.27 more than on other types of leisure trip (28.1% more) Spend per trip is around £10 per person per trip lower in Shropshire than the national average. The same is true for many rural locations, but if spend could be increased by £5 per trip, this would add around £60 million to the value of the day visitor market.



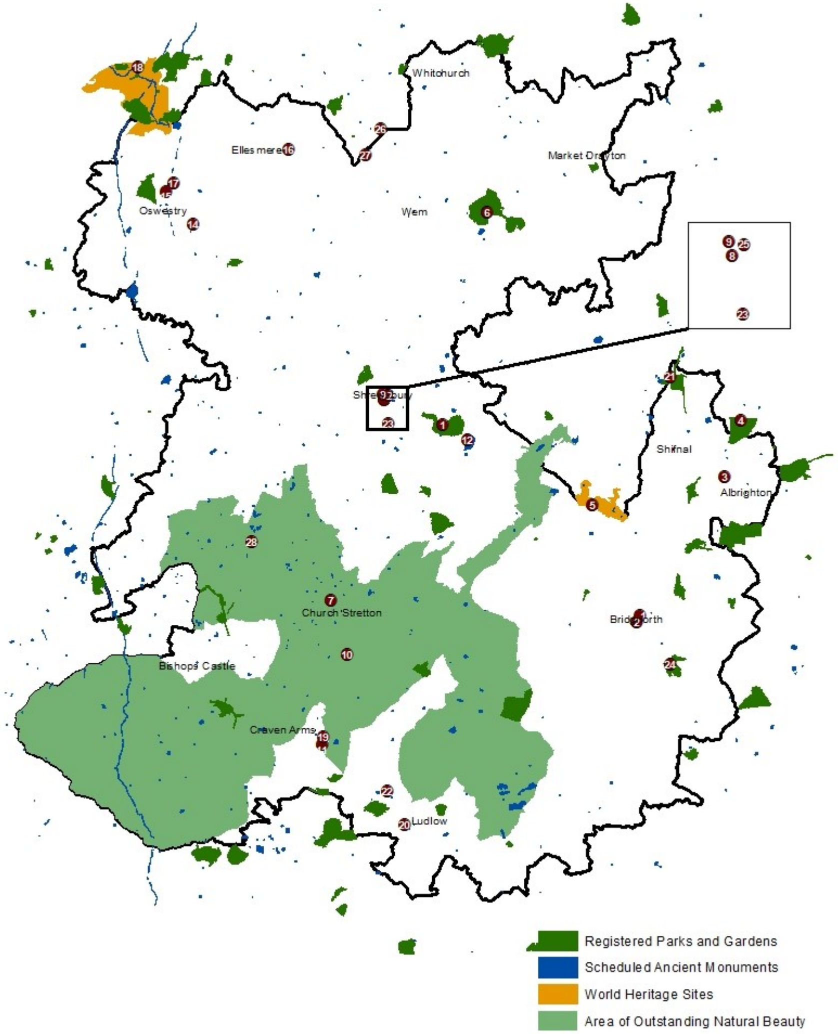
	Total Spend	Spend per Visit
Tourism	£288.9 million	£24.03
Other	£124.8 million	£18.76
All Leisure Day Visits	£413.7 million	£22.15

Source: Visit Britain

Shropshire's Natural and Historic Heritage Offer

- Shropshire is the only county in England to have part of two World Heritage Sites (Ironbridge and the Pontcysyllte Aqueduct).
- It has the third highest number of listed buildings (6,906) and Registered Parks and Gardens (30), and the fourth highest number of Conservation Areas (127) in the country
- 23% of the county is designated as an Area of Outstanding Natural Beauty (the Shropshire Hills).
- The county has 80km of canals that link the Midlands with mid and north-east Wales, 14 internationally important wetland sites, 7 Special Areas of Conservation (of European significance), 107 Sites of Special Scientific Interest, and more varied geology than anywhere else in Britain
- It is rightfully recognised as an exceptionally historic and beautiful county.
- These fantastic outdoor assets are not just important for heritage and wildlife; they bring in over £100 million annually to the local economy, employ at least 2,200 people, and make a significant contribution to improving mental and physical health and wellbeing.

Shropshire's Natural and Cultural Offer

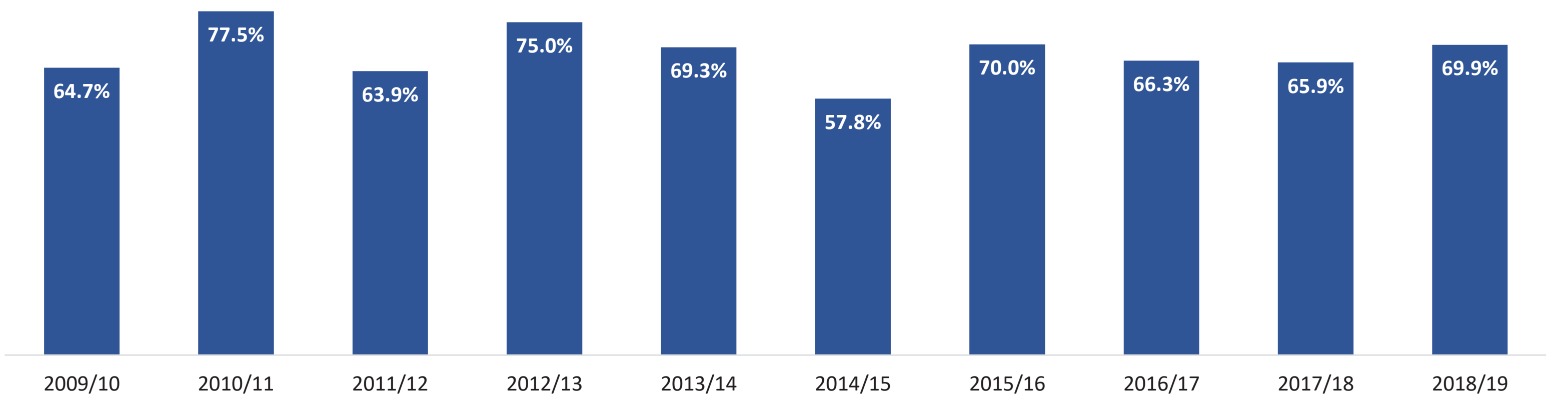


1 = Attingham Park
2 = Severn Valley Railway
3 = RAF Museum Cosford
4 = Weston Park
5 = Ironbridge Gorge Museums Trust
6 = Hawkstone Park Follies
7 = Carding Mill Valley and the Long Mynd
8 = Shrewsbury Museum & Art Gallery
9 = Theatre Severn
10 = Acton Scott Historic Working Farm
11 = Stokesay Castle
12 = Wroxeter Roman City
13 = Bridgnorth Cliff Railway
14 = British Ironworks Centre
15 = Oswestry Hill Fort
16 = The Mere
17 = Park Hall Farm
18 = Pontcysyllte Aqueduct
19 = Shropshire Hills Discovery Centre
20 = Ludlow Castle
21 = Lilleshall Sports Centre
22 = Ludlow Race Course
23 = Shrewsbury Town Football Club
24 = Dudmaston Hall
25 = Shrewsbury Castle
26 = Fenn’s, Whixall and Bettisfield Mosses National Nature Reserve
27 = Wem Moss National Nature Reserve
28 = Stiperstones National Nature Reserve

Engagement with the Natural Environment

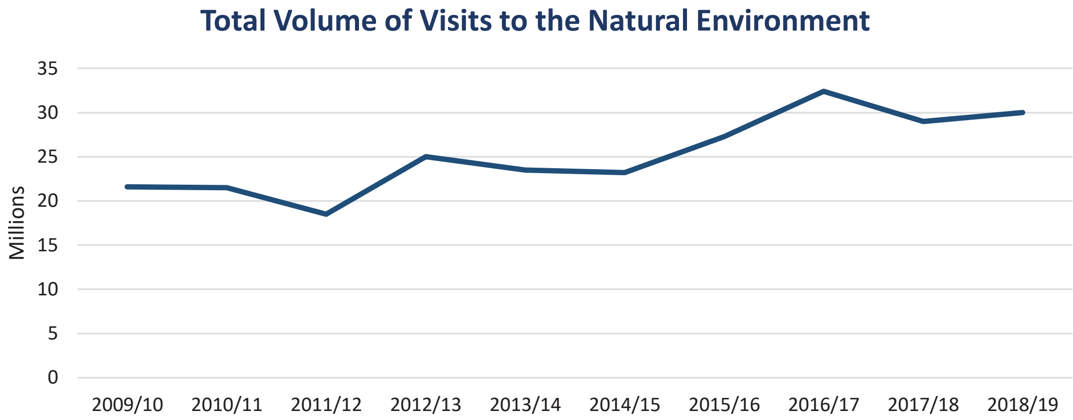
- The Monitor of Engagement with the Natural Environment Survey (MENE) is funded by Natural England, with support from DEFRA and the Forestry Commission. The survey collects information about the ways people engage with the countryside and green spaces in towns and cities.
- The survey shows that 69.9% of Shropshire residents visited the natural environment at least once a week in 2018/19. The proportion has fluctuated in recent years, but is consistently above the national average (65% in 2018/19).

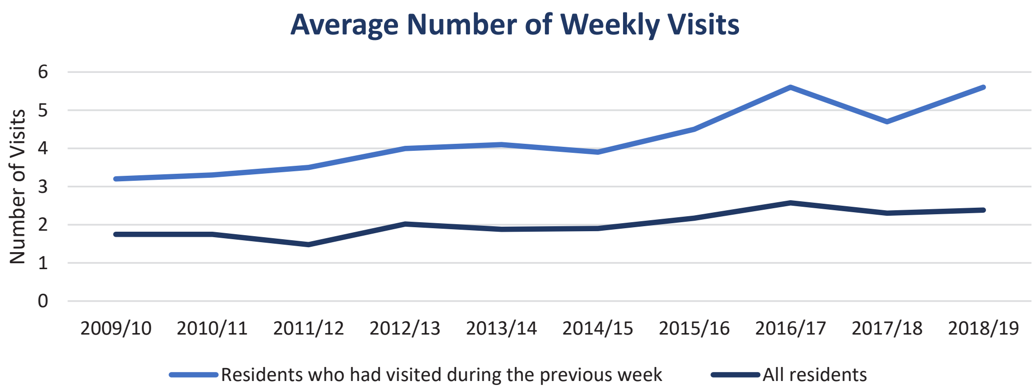
Proportion of Adults Accessing the Natural Environment at least Once a Week



Source: Monitor of Engagement with the Natural Environment

- The total number of visits to the natural environment made by Shropshire adults amounted to an estimated 30 million in 2018/19.
- This represents an increase of 8.4 million visits since 2009/10 (+38.9%).
- It is however down from a peak of 32.4 million in 2016/17.
- On average, each Shropshire adult visited the natural environment 124 times in 2018/19, compared with 91 times in 2009/10.





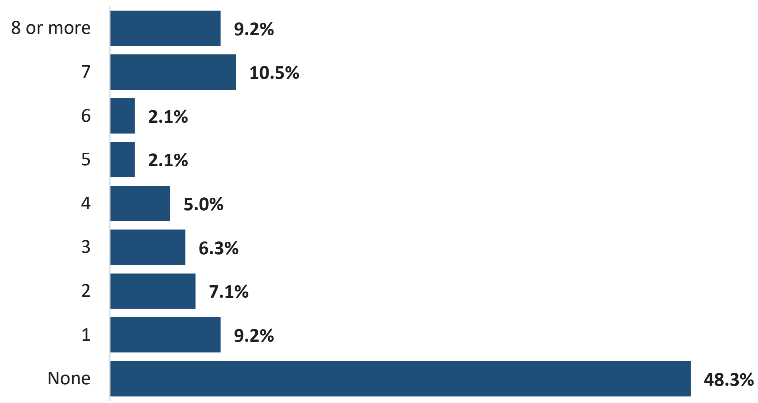
- The average number of visits to the natural environment amongst all Shropshire adults was 2.4 in 2018/19.
- Amongst those that had accessed the natural environment at least once in the week before they were surveyed, the frequency of visits was far higher at 5.6 visits.
- The average duration of each trip is 114.1 minutes.

Source: Monitor of Engagement with the Natural Environment

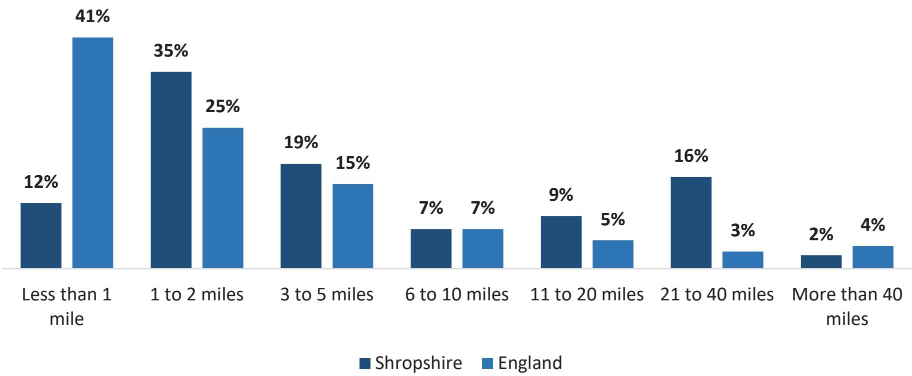
- 48% of survey respondents had not accessed the natural environment at all in the week prior to being questioned.
- At the other end of the scale, around one in five had visited at least once a day.
- 22% of visits were with children*
- 50% of visits were made alone*
- The average party size was 2 people*
- The average number of adults per party was 1.6*

  * Average over last three years of survey
- Two-thirds of visits were within a distance of 5 miles, but just 12% are within a mile compared with 41% for England. As a consequence, Shropshire visitors were less likely to arrive on foot.

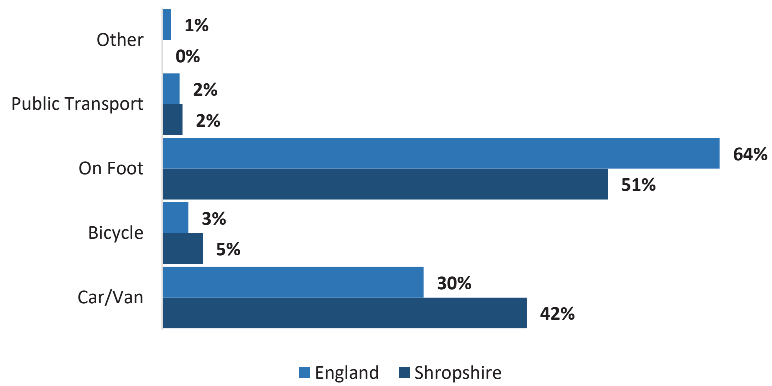
Number of Visits per Week in the Week Before Survey



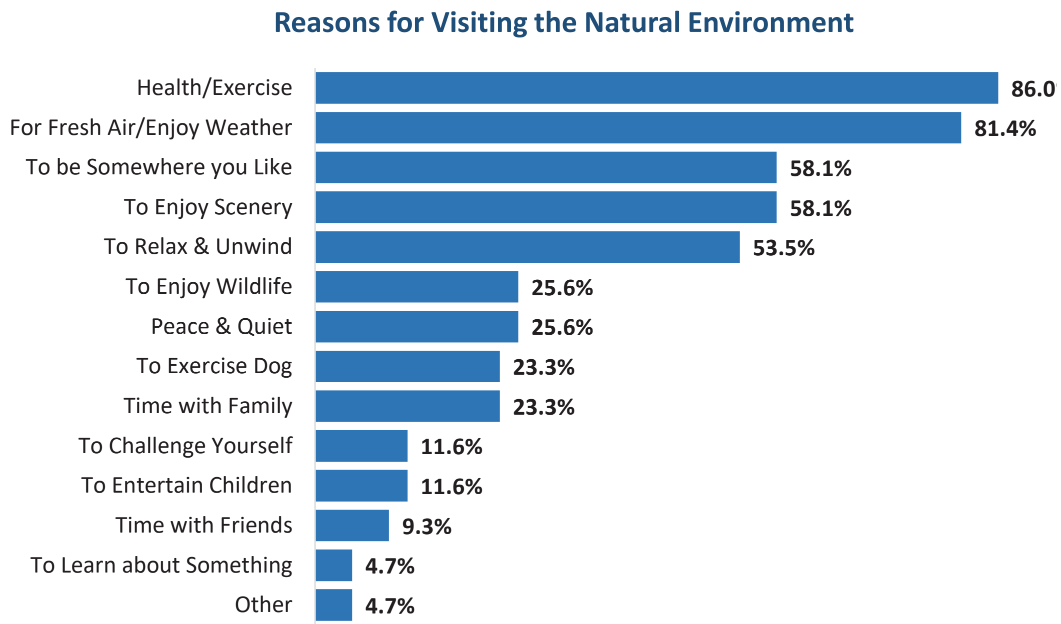
Distanced Travelled to Natural Environment



Means of Travel to the Natural Environment

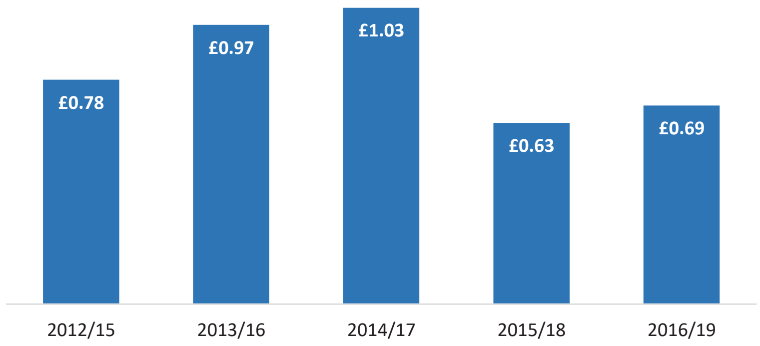


- The main motivation for visiting the natural environment is for health/exercise (86%)
- More than four-fifths of residents also said the reason for their visit was to enjoy the weather or for some fresh air
- More than half wanted to enjoy the scenery and /or to be somewhere they like
- More than half of visits were to relax/unwind
- Other significant reasons for enjoying the natural environment were for peace and quiet, to enjoy the wildlife, to exercise the dog or to spend time with family
- The two main reasons given for not spending time in the natural environment are old age (50% of those not participating) and ill health (42%).

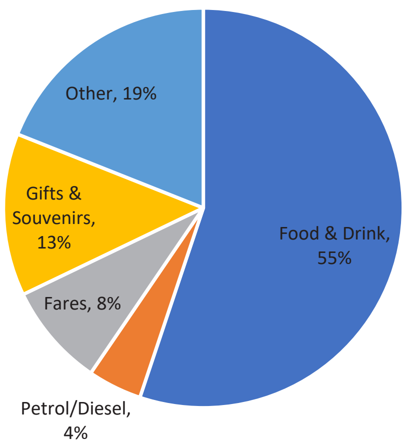


- Spend per person per trip to access the natural environment is very low, at just £0.69 on average based on a three year rolling average.
- Although this represents a very small increase (+£0.06) compared with the previous three year average, the long term trend is downward.
- Almost three-quarters of all trips do not incur any expenditure at all (74%).
- Where expenditure is incurred, at the average spend per person is £2.63

Spend per Visit



Breakdown of Spend by Type

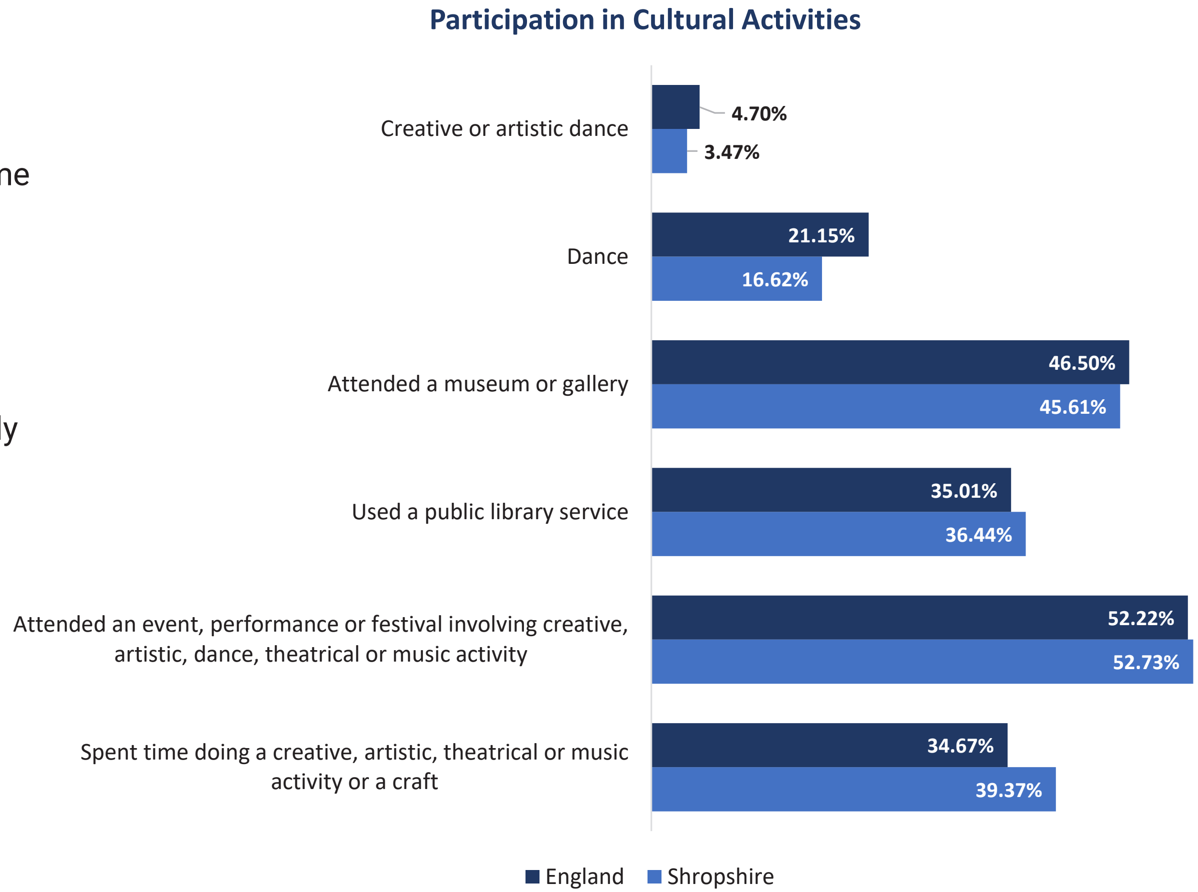


- The majority of spend is on food and drink (55%)
- Gifts and souvenirs represent 13% of spend
- 12% of spend is related to transport – 8% on fares and 4% on petrol or diesel.

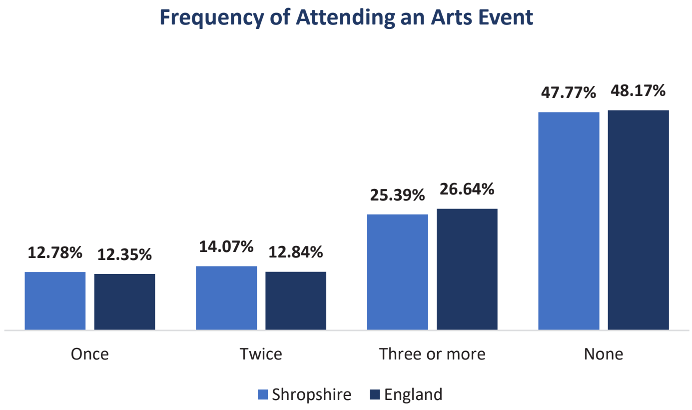
Source: Monitor of Engagement with the Natural Environment, figures based on rolling three year average due to small sample size

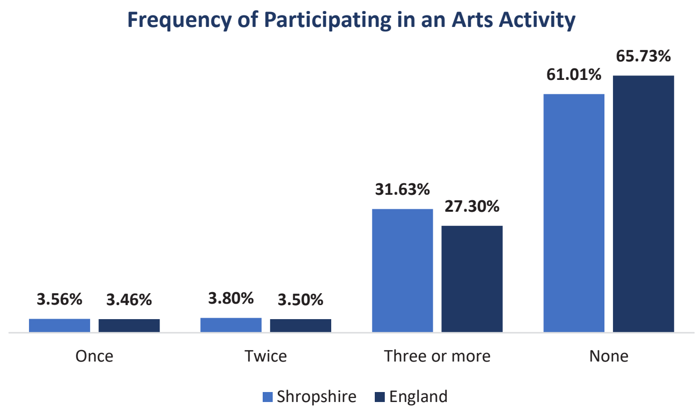
Participation in Cultural Activities

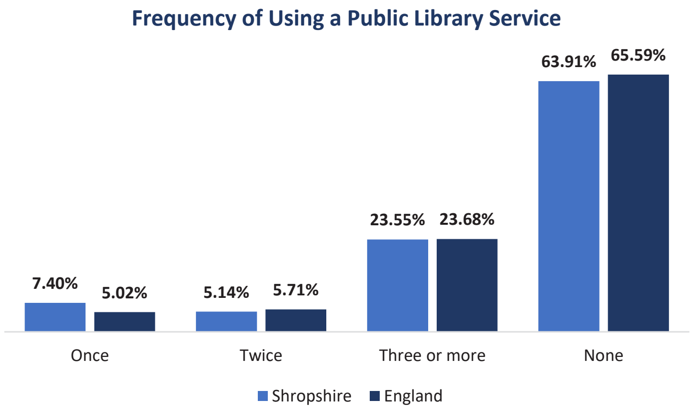
- More than half of Shropshire residents have attended an event, performance or festival within the last 12 months. This is in line with the national average.
- Almost four out of 10 residents had spent time doing creative, artistic, theatrical or musical activities – this is higher than the average for England
- 46% have visited a museum or gallery, very marginally lower than the national average
- 36% have used a public library service, slightly more than the national average
- 16% have participated in some form of dance, although for only a small minority of the population was this creative or artistic dance.

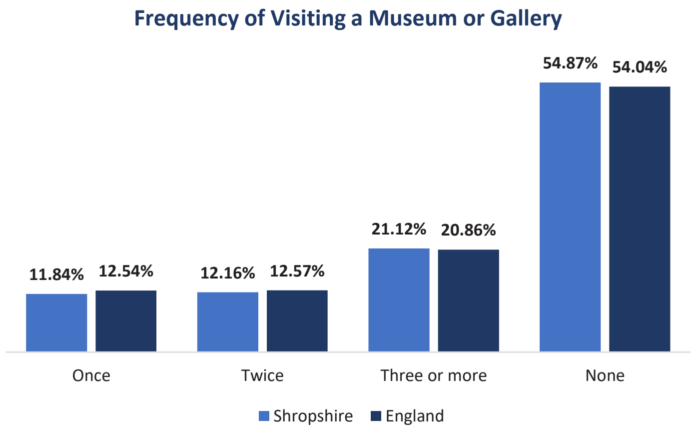


- The charts below show that across the range of different cultural activities, consumers who participate are much more likely to do so on three or more occasions in a year than only once or twice. This is particularly true for public library service users and those who take part in arts activities.



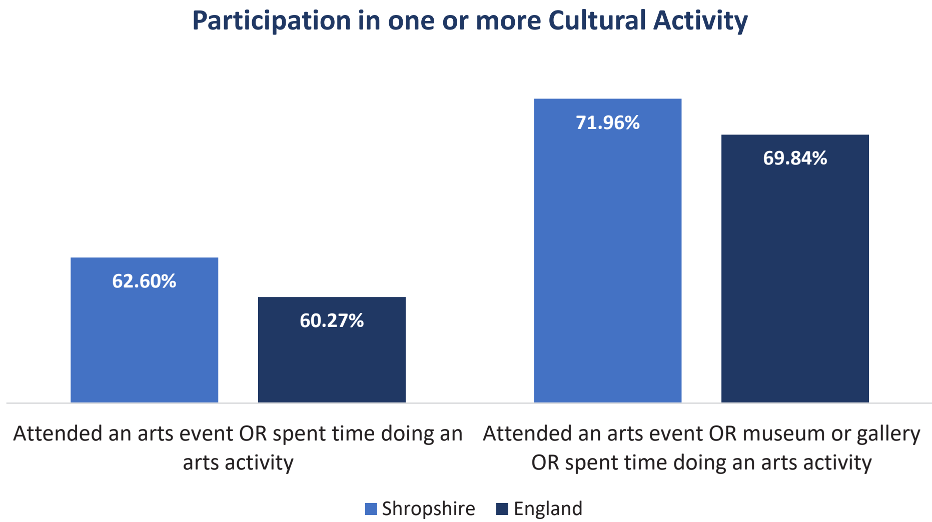


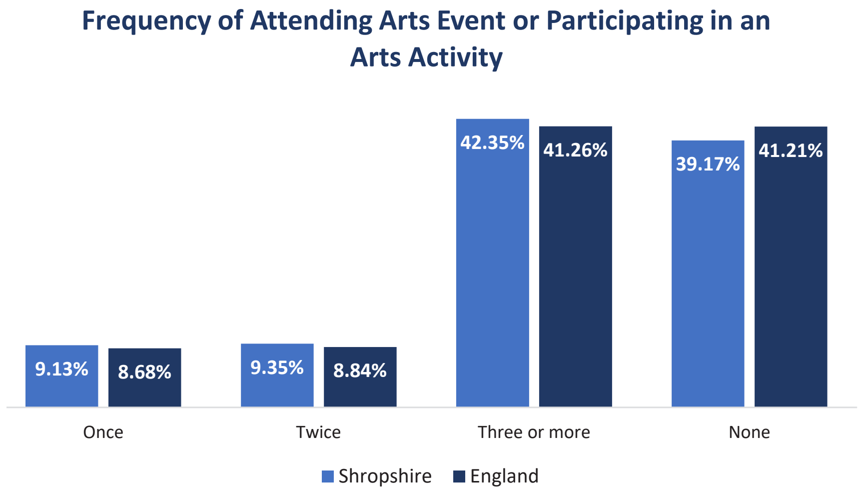


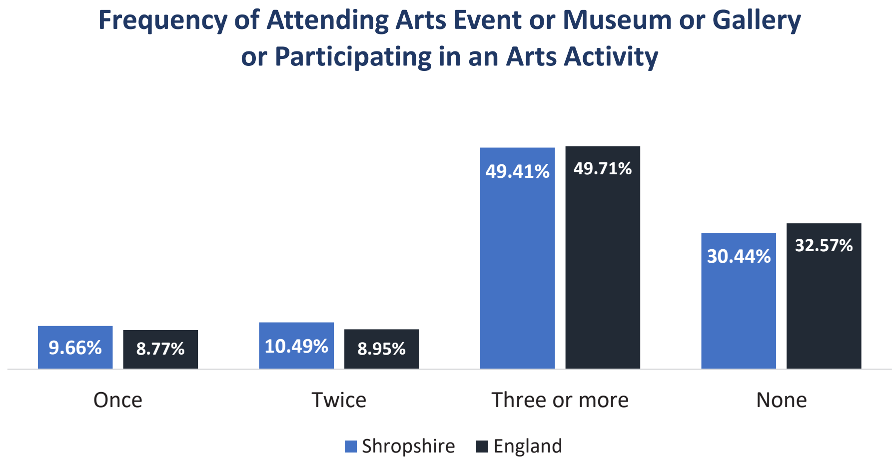


Source: Active Lives, Survey undertaken between 2015 and 2017

- 72% of the Shropshire population has attended an arts event, participated in an arts activity or visited a museum or gallery over the last year.
- This is slightly higher than the average for England.
- Almost 63% have either attended an event or participated in an arts-related activity – again, this is slightly higher than the national average.
- Consumers are more than twice as likely to participate in at least one type of cultural activity than at least three times a year as they are once or twice.





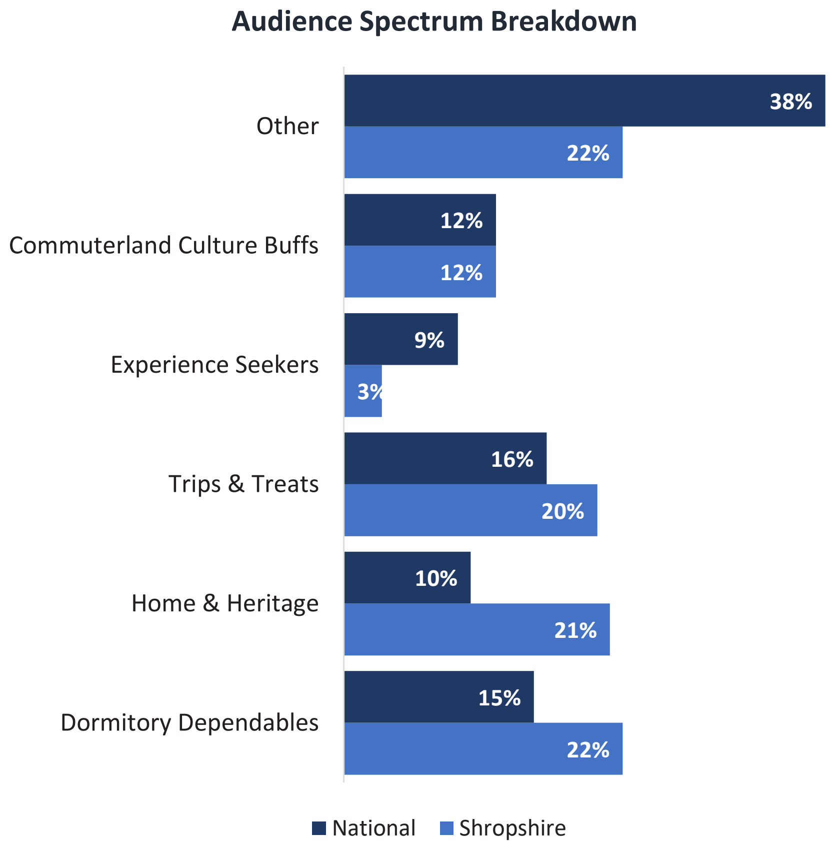


Source: Active Lives, Survey undertaken between 2015 and 2017

Audience Segmentation

The most prominent audience spectrum in Shropshire are:

- Dormitory Dependables - Regular but not frequent cultural attenders living in city suburbs and small towns.
- Predominantly older families and singles, with a large proportion of households with children. They are warm to museums and the arts, and in particular to popular and mainstream events. They are very keen on live music events and have a particular preference for the heritage offer.
- Home & Heritage - Conservative and mature households who have a love of the traditional. This is a not a highly engaged group, limited by physical access to an appropriate arts and cultural offer and the means to get there.
- Trips & Treats - Suburban households, often with children, whose cultural activities usually are part of a day out or treat. Suburban adults and families enjoying active lives which involve arts and cultural engagement for predominately social and educational reasons.



Number of Visits to Shropshire Council Owned Cultural Facilities

There were 2,346,896 visits to council facilities over 2018/19

- There were 918,755 **Library** visits
- There were 182,728 **Museums** visits, with the largest number in Shrewsbury MAG (104,183)
- There were 977,522 **Outdoor Recreation** visits
- There were 199,362 visits to **Theatre Seven**
- There were 68,529 visits to **The Old Market Hall**

Volunteer hours by site

Over 2018/2019, 71,989 volunteer hours were provided over 8 key Council cultural sites:

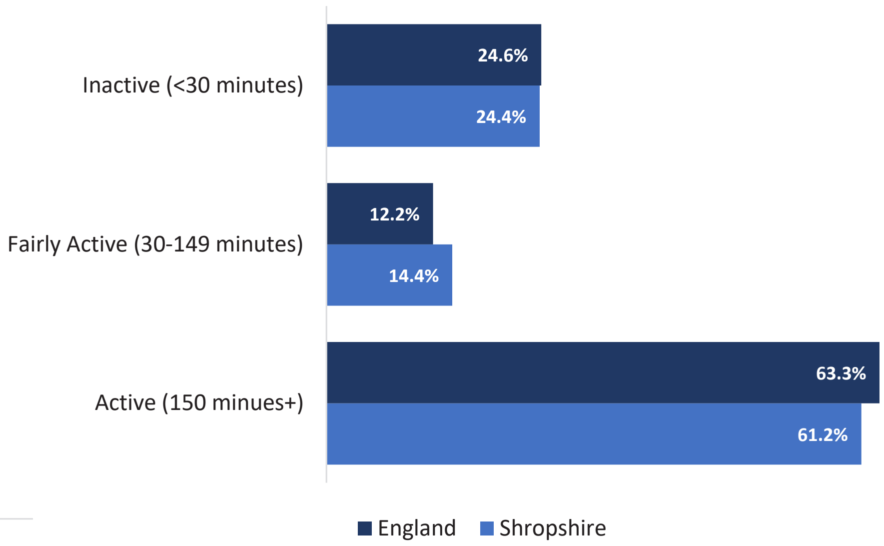
- Libraries
- Archives
- Outdoor Recreation
- Shrewsbury MAG
- Acton Scott
- Shrewsbury Castle
- Much Wenlock Museum
- Ludlow MRC

The largest number was 35,618 for Outdoor Recreation

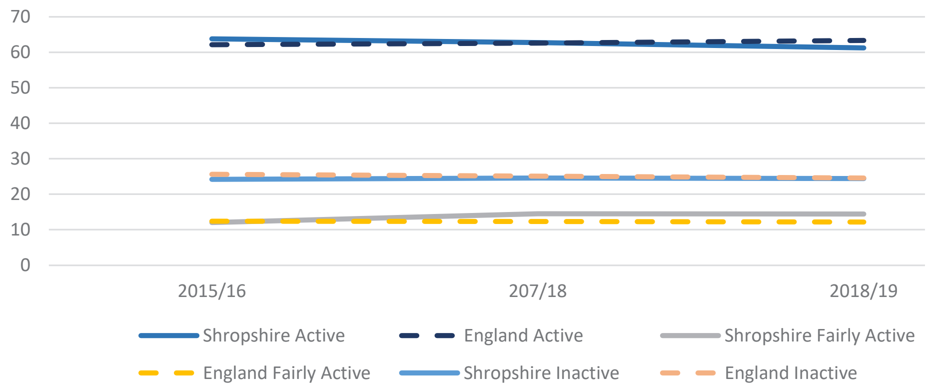
Participation in Sporting Activities

- 61.2% of adults in Shropshire are physically active, achieving the recommended 150 minute or more per week.
- This is slightly lower than the national average (63.3%), which is due to Shropshire's older demographic.
- Notwithstanding the ageing population the proportion of the population which is inactive (less than 30 minutes physical activity per week) is comparable with the national average.

Levels of Participation in Physical Activity



Change in Activity Levels

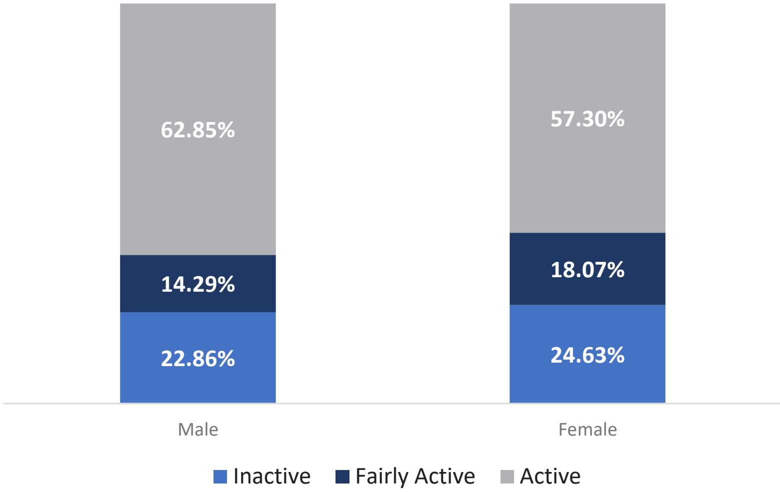


- Since 2015/16, the proportion of the Shropshire population that is active has declined very slightly (from 63.8%), although the proportion that is inactive has held stable.
- In contrast, the proportion of active adults has increased across England.
- However, as shown in chart opposite, change in activity levels has been very slight since 2015/16.

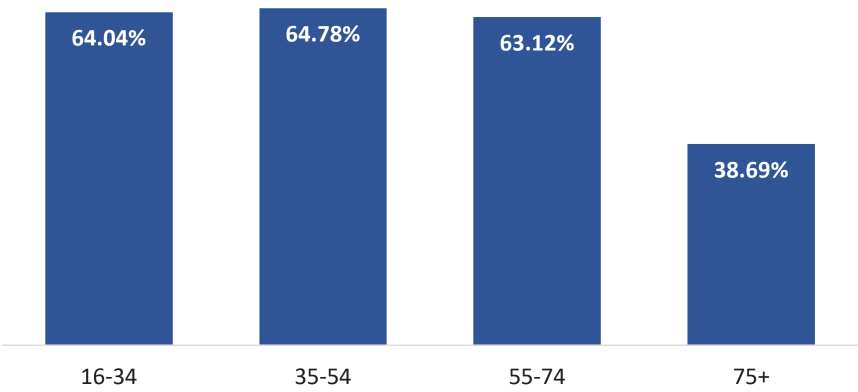
Source: Sports England Active Lives Survey, November 2018-2019

- Levels of participation in physical activity in Shropshire are fairly consistent across age groups until the age of 75, when they tail off significantly.
- Women are more likely to be inactive than men, and are less likely to undertake 150 minutes or more physical activity a week.
- Shropshire residents with a disability are more than three times more likely to be physically inactive than their able-bodies counterparts.

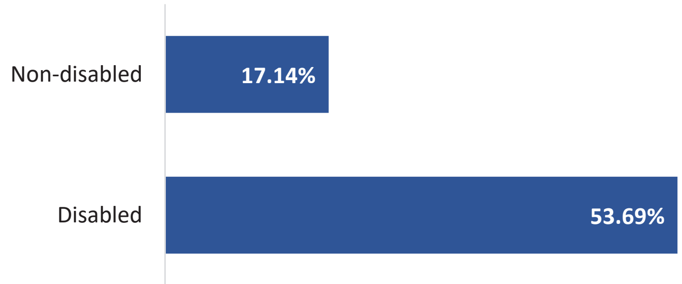
Percent of Adults who are Active by Gender



Percent of Adults who are Active by Age

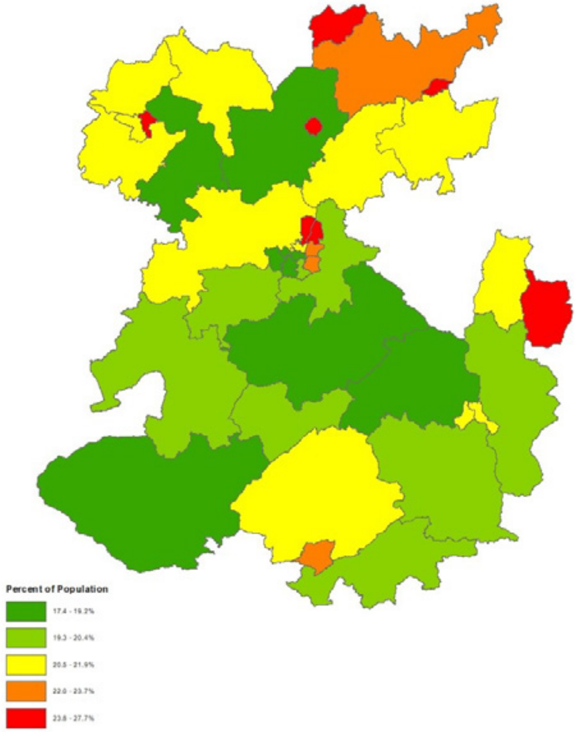


Percent of Adults who are Inactive by Disability

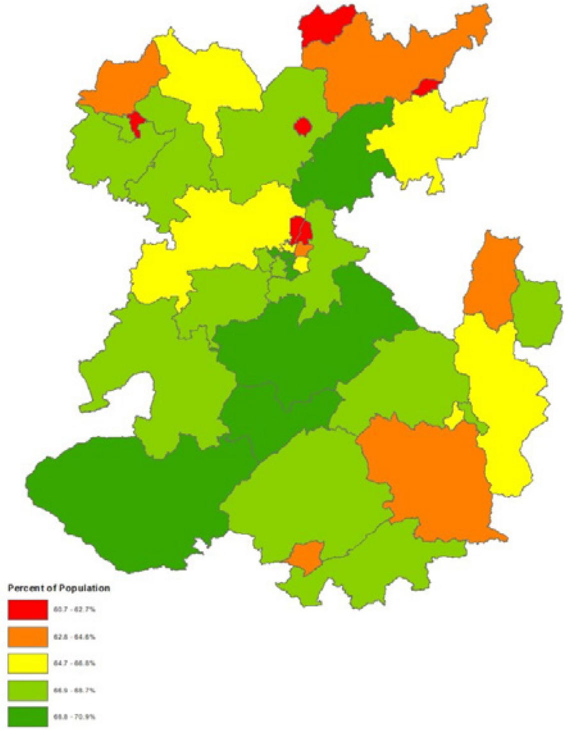


Source: Sports England Active Lives Survey, May 2018-2019

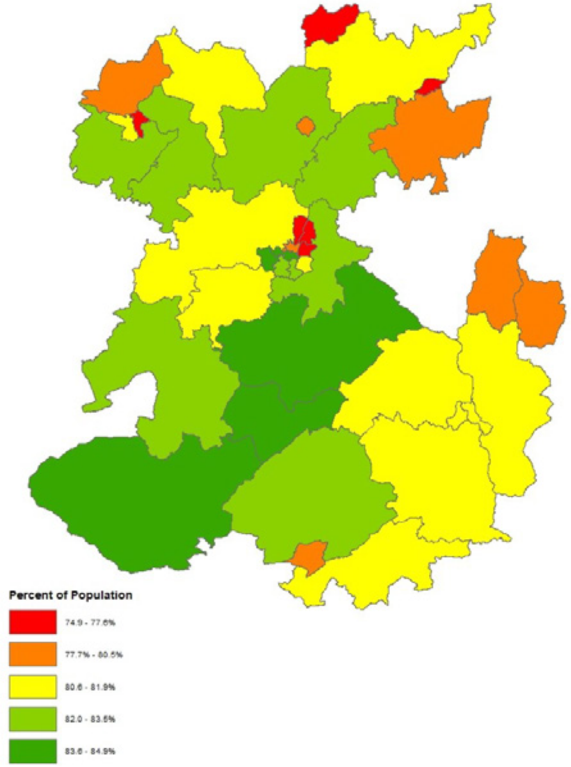
Percentage of the Population which is Inactive



Percentage of the Population with is Active



Percentage of the Population Taking Part in Sport at least Twice a Week



Source: Sports England Active Lives Survey, November 2018-2019

Wellbeing and Life Satisfaction

In 2018/19:

- 63.9% of Shropshire residents rated their levels of anxiety as either good or very good (40.1% very good)
- 77.0% of Shropshire residents rated their levels of happiness as either good or very good (40.9% very good)
- 82.3% of Shropshire residents rated their levels of life satisfaction as either good or very good (33.4% very good)
- 84.5% of Shropshire residents rated their levels of feeling that things are worthwhile as either good or very good (38.4% very good)

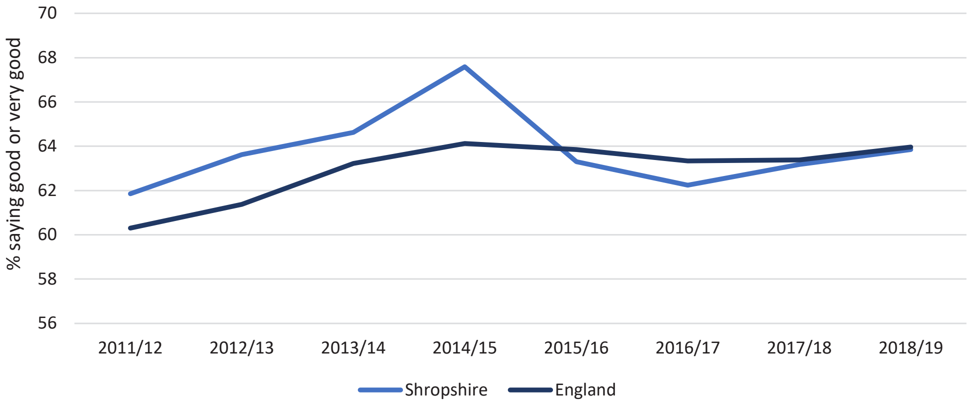
Generally, feelings of wellbeing are on a slight upwards trajectory, albeit with notable annual fluctuations:

- Anxiety: +2 percentage points in proportion reporting good or very good
- Happiness: +0.76 percentage points in proportion reporting good or very good
- Life Satisfaction: +2.7 percentage points in proportion reporting good or very good
- Worthwhile: +0.14 percentage points in proportion reporting good or very good

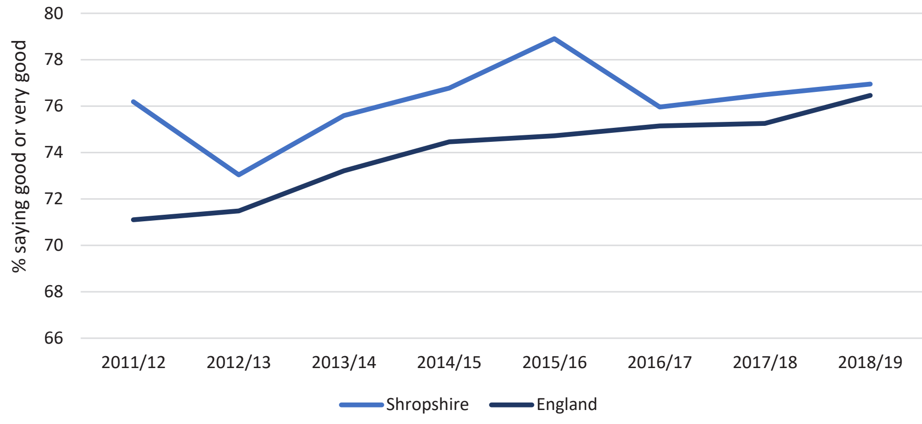
Across the four wellbeing indicators, Shropshire scores higher or on a par with the national average, although the gap is closing across the board:

- Anxiety: -0.11% fewer reporting good or very good compared with England
- Happiness: +0.49% more reporting good or very good compared with England
- Life Satisfaction: 0.98% more reporting good or very good compared with England
- Worthwhile: 0.19% more reporting good or very good compared with England

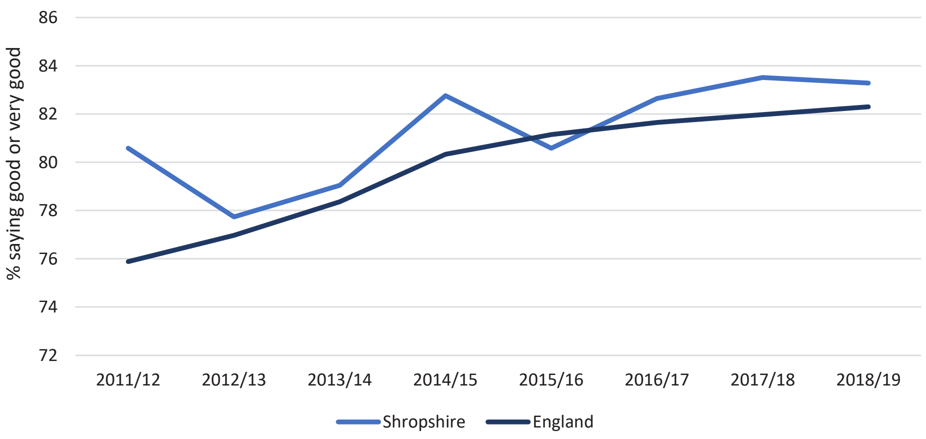
Positive Personal Estimates Relating to Anxiety



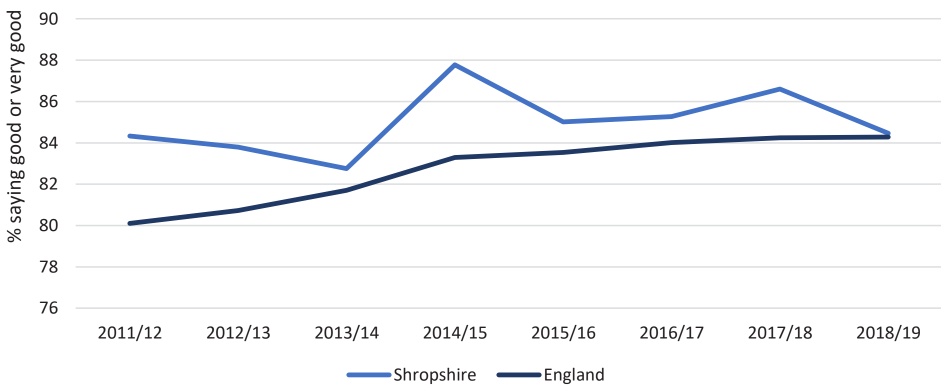
Positive Personal Estimates Relating to Happiness



Positive Personal Estimates Relating to Life Satisfaction

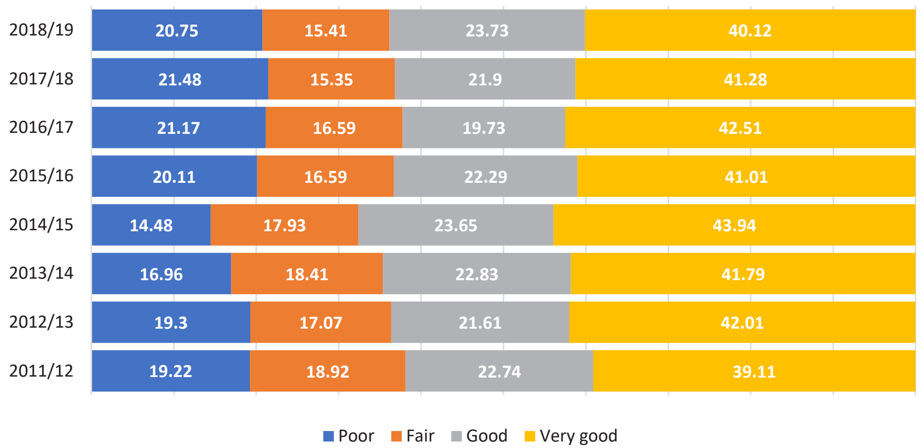


Positive Personal Estimates Relating to Feeling Things are Worthwhile

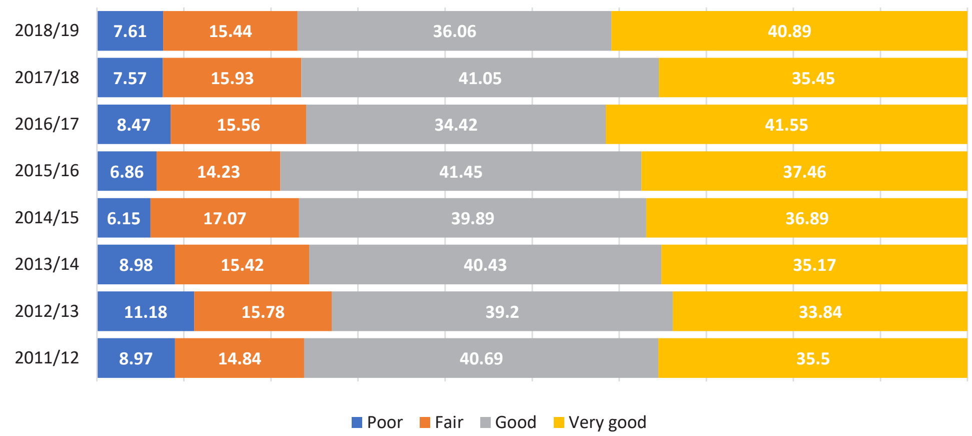


Source: Office for National Statistics Well-Being Survey

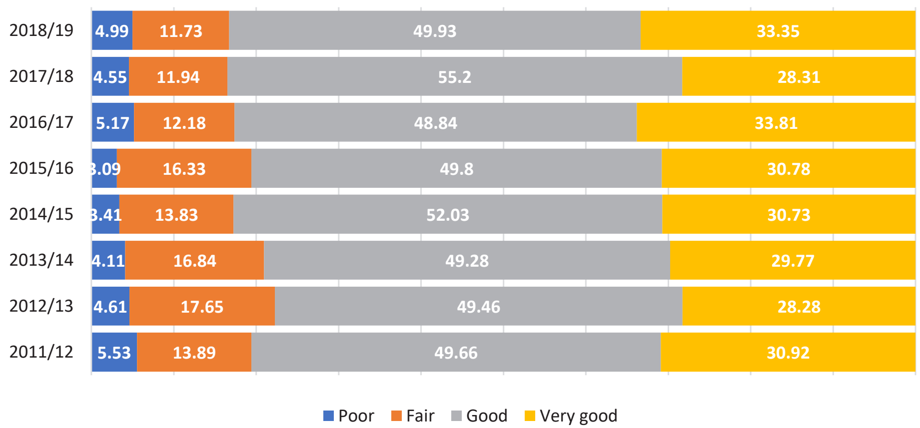
Personal Well-Being Estimates: Anxiety



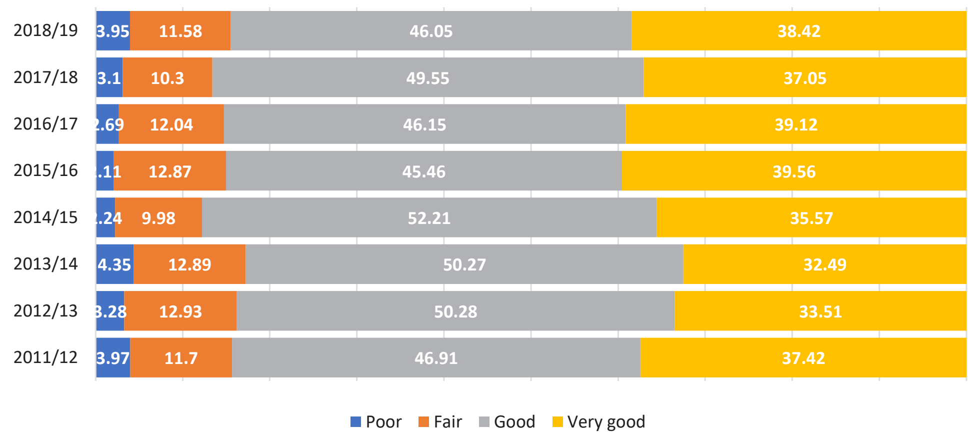
Personal Well-Being Estimates: Happiness



Personal Well-Being Estimates: Life Satisfaction



Personal Well-Being Estimates: Worthwhile



Source: Office for National Statistics Well-Being Survey

Public Health England: Health Profile for Shrophire

Life Expectancy & Causes of Death

Compared with benchmark: Better Similar Worst Not compared

Recent trends: – Could not be calculated; No significant change; Increasing / Getting worse; Increasing / Getting better; Decreasing / Getting worse; Decreasing / Getting better; Increasing; Decreasing

Benchmark Value

Worst 25th Percentile 75th Percentile Best

Indicator	Period	Shropshire			Region	England	England		
		Recent Trend	Count	Value	Value	Value	Worst	Range	Best
Life expectancy at birth (Male)	2016 - 18	–	-	80.5	78.9	79.6	74.5		83.9
Life expectancy at birth (Female)	2016 - 18	–	-	83.5	82.7	83.2	79.5		87.0
Under 75 mortality rate from all causes	2016 - 18	–	2,946	295	354	330	544		223
Under 75 mortality rate from all cardiovascular diseases	2016 - 18	–	623	61.5	78.4	71.7	124.6		41.8
Under 75 mortality rate from cancer	2016 - 18	–	1,259	123.2	138.3	132.3	190.3		94.8
Suicide rate	2016 - 18	–	72	8.7	9.7	9.6	19.5		5.1

Injuries & Ill Health

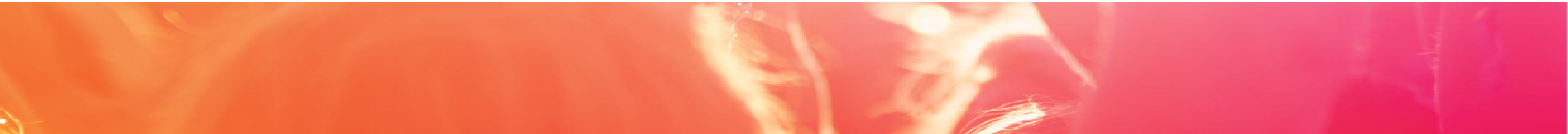
Compared with benchmark: Better Similar Worse Not compared

Recent trends: – Could not be calculated | No significant change | Increasing / Getting worse | Increasing / Getting better | Decreasing / Getting worse | Decreasing / Getting better | Increasing | Decreasing

Benchmark Value

Worst/Lowest | 25th Percentile | 75th Percentile | Best/Highest

Indicator	Period	Shropshire			Region	England	England		
		Recent Trend	Count	Value	Value	Value	Worst/ Lowest	Range	Best/ Highest
Killed and seriously injured (KSI) casualties on England's roads	2016 - 18	–	501	52.6	38.4	42.6*	97.4		17.7
Emergency Hospital Admissions for Intentional Self-Harm	2018/19		480	164.0	200.5	193.4	433.4		51.6
Hip fractures in people aged 65 and over	2018/19		460	589	585	558	772		350
Cancer diagnosed at early stage (experimental statistics)	2017		693	49.2%	51.4%	52.2%	41.9%		57.7%
Estimated diabetes diagnosis rate	2018	–	-	71.4%	86.3%	78.0%	54.3%		97.5%
Estimated dementia diagnosis rate (aged 65 and over) ≥ 66.7% (significantly) similar to 66.7% < 66.7% (significantly)	2019	–	3,616	71.7%	66.1%	68.7%	53.6%		90.2%



Behavioural Risk Factors

Compared with benchmark: Better Similar Worse Not compared

Recent trends: – Could not be calculated; No significant change; Increasing / Getting worse; Increasing / Getting better; Decreasing / Getting worse; Decreasing / Getting better; Increasing; Decreasing

Benchmark Value

Worst 25th Percentile 75th Percentile Best

Indicator	Period	Shropshire			Region	England	England		
		Recent Trend	Count	Value	Value	Value	Worst	Range	Best
Admission episodes for alcohol-specific conditions - Under 18s	2016/17 - 18/19	–	45	25.1	26.1	31.6	106.7		7.8
Admission episodes for alcohol-related conditions (Narrow)	2018/19	↑	2,368	689	739	664	1,127		389
Smoking Prevalence in adults (18+) - current smokers (APS) New data	2019	–	35,713	13.7%	14.1%	13.9%	23.4%		8.0%
Percentage of physically active adults	2018/19	–	-	68.5%	64.0%	67.2%	46.7%		79.6%
Percentage of adults (aged 18+) classified as overweight or obese	2018/19	–	-	72.4%	65.6%	62.3%	75.9%		41.7%

Child Health

Compared with benchmark: Better Similar Worse Not compared

Recent trends: – Could not be calculated; No significant change; Increasing / Getting worse; Increasing / Getting better; Decreasing / Getting worse; Decreasing / Getting better; Increasing; Decreasing

Benchmark Value

Worst 25th Percentile 75th Percentile Best

Indicator	Period	Shropshire			Region	England	England		
		Recent Trend	Count	Value	Value	Value	Worst	Range	Best
Under 18s conception rate / 1,000	2018	→	58	11.0	19.1	16.7	39.4		3.6
Smoking status at time of delivery	2018/19	→	347	14.0%	11.9%*	10.6%	25.7%		1.6%
Breastfeeding initiation	2016/17	–	2,019	78.4%	68.9%	74.5%	37.9%		96.7%
Infant mortality rate	2016 - 18	–	36	4.3	5.8	3.9	8.2		1.0
Year 6: Prevalence of obesity (including severe obesity)	2018/19	→	451	16.6%	22.9%	20.2%	29.6%		10.7%

Inequalities

Compared with benchmark: Better Similar Worse Not compared

Quintiles: Best Worst Not applicable

Recent trends: – Could not be calculated | No significant change | Increasing / Getting worse | Increasing / Getting better | Decreasing / Getting worse | Decreasing / Getting better | Increasing | Decreasing

Benchmark Value

Worst 25th Percentile 75th Percentile Best

Indicator	Period	Shropshire			Region	England	England		
		Recent Trend	Count	Value	Value	Value	Worst	Range	Best
Deprivation score (IMD 2015)	2015	–	-	16.7	-	21.8	42.0		5.7
Smoking Prevalence in adults in routine and manual occupations (18-64) - current smokers (APS) New data	2018	–	-	22.3%	23.4%	25.4%	46.5%		13.6%
Inequality in life expectancy at birth (Male)	2016 - 18	–	-	5.4	9.7	9.5	15.2		3.8
Inequality in life expectancy at birth (Female)	2016 - 18	–	-	2.1	7.2	7.5	13.8		1.8

Wider Determinants of Health

Compared with benchmark: Better Similar Worse Not compared

Recent trends: – Could not be calculated → No significant change ↑ Increasing / Getting worse ↑ Increasing / Getting better ↓ Decreasing / Getting worse ↓ Decreasing / Getting better ↑ Increasing ↓ Decreasing

Benchmark Value

Worst 25th Percentile 75th Percentile Best

Indicator	Period	Shropshire			Region	England	England		
		Recent Trend	Count	Value	Value	Value	Worst	Range	Best
Children in low income families (under 16s)	2016	↓	5,850	12.2%	20.3%	17.0%	31.8%		6.4%
Average Attainment 8 score	2018/19	–	132,267	46.5	45.7	46.9	39.0		57.5
Percentage of people aged 16-64 in employment	2018/19	→	152,200	83.5%	73.8%	75.6%	61.7%		84.3%
Statutory homelessness - Eligible homeless people not in priority need	2017/18	→	388	2.8	1.1	0.8	8.1		0.1
Violent crime - hospital admissions for violence (including sexual violence)	2016/17 - 18/19	–	190	22.3	42.9	44.9	127.6		12.1

Health Protection

Compared with benchmark: Better Similar Worse Not compared

Recent trends: – Could not be calculated ➡ No significant change ⬆ Increasing / Getting worse ⬆ Increasing / Getting better ⬇ Decreasing / Getting worse ⬇ Decreasing / Getting better ⬆ Increasing ⬇ Decreasing

Indicator	Period	Shropshire			Region	England	England		
		Recent Trend	Count	Value	Value	Value	Worst	Range	Best
Excess winter deaths index	Aug 2017 -Jul 2018	–	259	23.2%	30.8%	30.1%	49.2%		9.3%
New STI diagnoses (exc chlamydia aged <25) / 100,000	2018	➡	730	380	680	851	3,823		380
TB incidence (three year average)	2016 - 18	–	16	1.7	11.3	9.2	49.3		0.7

Investment

Arts Council for England (ACE) National Portfolio Organisations (NPO) funding 2018 – 2022

- There are 5 National Portfolio Organisations (NPO) in Shropshire which brings in an annual investment of £815,285 from ACE which equals £3,308,164 over the years 2018/22.
- This compares with 5 NPOs in Herefordshire.
- As AIM is a national organisation, there may be an opportunity to leverage more impact from its presence in the county.

	Per year	2018-2022
Arts Alive	£47,025	£235,124
Association of Independent Museums (AIM)	£300,000	£1,200,000
Disability Arts in Shropshire	£120,000	£480,000
Meadow Arts	£160,928	£643,712
Pentabus Arts	£187,332	£749,328
TOTAL	**£815,285**	**£3,308,164**

ACE Project Funding – 2018 - 2020

- In 2019/2020 there were 17 Project Grants awarded by ACE to artists and organisations based in Shropshire, with a total value of £259,529. The average value of each grant was £15,266. The highest grant was awarded to the Arty Party Secret Lives project (£42,385).
- In 2018/19, the total number of projects supported was 21, with a total value of £335,358.
- This means that over the last two years, there has been investment worth £594,887 through ACE project funding in Shropshire.

2019/2020 ACE Project Funded Projects in Shropshire

Recipient	Activity name	Award amoun
Wildcard	Electrolyte, National Tour (2)	£15,000
The Shrewsbury Morris Dancers	Shrewsbury Giant	£15,000
Michael Rust	Wenlock Edge Festival of Words	£14,800
Arty Party	Secret Lives	£42,385
Whittington Music Festival	Folklassical 2020	£15,000
Amy Douglas	From Fireside to Facebook	£14,800
Deborah Alma	The Poetry Pharmacy	£12,190
Dan Shutt	Albanian polyphony in the UK	£3,445
Tony Phillips	20th Century Chapel (II)	£5,161
Halima Cassell	Publication and talk programme	£15,000
National Association for Areas of Outstanding Natural Beauty	Art in the Landscape: Connecting People to Nature	£14,900
Nadia Kingsley	Umbrella - mentoring, inclusive workshops, creating high quality creative animation and eBook	£16,128
Ellesmere Sculpture Initiative	Labyrinth	£15,000
Suzanne Thomas	Where Dragons lead	£15,910
Wildcard	Wildcard's 2020 Season	£15,000
Carole Thorpe-Gunner	Dystonic Forms	£14,810
shropshire music trust	Music for All 2020	£15,000
TOTAL		£259,529

- Shropshire invests £10,648,164 into cultural provision (2017/18)
- The largest proportion is allocated to Theatres and Public Entertainment at £4,839,758 (45%).
- Shropshire receives income of £5,026,391 from Theatres meaning they generate an annual excess of £186,633
- Across all investment area expenditure outstrips income by £4,786,862.

	Income	Expenditure	Net Income
Archives	£140,245	£531,167	-£390,922
Arts Development & Support	£4,621	£122,682	-£118,061
Library Services	£253,682	£3,691,630	-£3,437,948
Museums & Galleries	£436,363	£1,462,927	-£1,026,564
Theatres & Public Entertainment	£5,026,391	£4,839,758	£186,633
Total	£5,861,302	£10,648,164	-£4,786,862

Source: ACE Cultural Dashboard for LEPs

Lottery Funding

- In 2018/2019 organisations in Shropshire raised £712,352 from the National Lottery for 85 projects.
- Of these, 8 were primarily cultural totalling £636,965 including a project from Designs in Mind who received £148,700 towards their costs over the next 3 years.
- £59,500 was invested in improving 6 village and parish halls.

Shropshire Council Funding

2019/20

In 2019/2020, Shropshire Council provided grant-in-aid funding of £24,550. The largest awards of £1,300 were given to:

- Arts Alive & Flicks in Sticks
- Designs in Mind
- Hive Music and Media Centre
- MediaActive Projects CIC
- Pentabus Arts Limited

22 organisations were funded sharing £20,600 and 7 festivals were funded, sharing £3,950.

- 24% of organisations work countywide
- 24% of organisations are based in north Shropshire
- 28% of organisations are based in central Shropshire
- 24% of organisations are based in south Shropshire.

The programmes delivered attracted audiences of 547,339, of which:

- 535,000 people aged 16+
- 12,338 children and young people aged under 16
- 287,970 people aged 16+ and 25,590 children and young people aged under 16 engaged in the programmes as participants.

This equates to 2 pence per person.

2,946 volunteers supported the activity, working between them a total of 45,698 hours
4,740 artists were employed

The council grant supported organisations in securing over £3 million pounds from other sources.

Shropshire Council Funding

2020/21

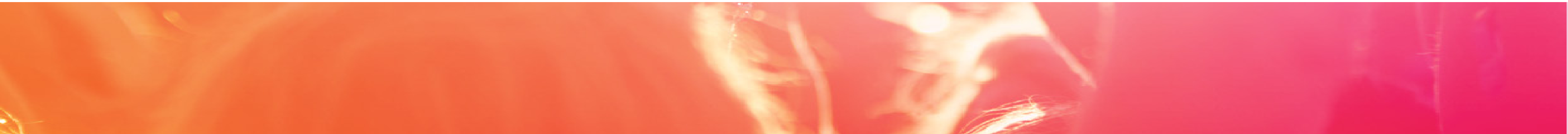
In 2020/21 Shropshire Council provided grant funding of £20,000 to four organisations, receiving £5,000 each.

- MediaActive Projects CIC
- Mythstories
- Pentabus Theatre
- SpArC Theatre

It is estimated this funding will benefit 164 artists; engage 1660 participants and reach audiences of 271,900 people.

For more information on Shropshire’s demographic and socio-economic characteristics, please visit:

https://www.shropshire.gov.uk/information-intelligence-and-insight/facts-and-figures/shropshire-snapshots/



Appendix A: Industry Classifications for the Creatives & Tech Sector

- 7021 : Public relations and communication activities
- 7311 : Advertising agencies
- 7312 : Media representation
- 7111 : Architectural activities
- 8552 : Cultural education
- 2611 : Manufacture of electronic components
- 2612 : Manufacture of loaded electronic boards
- 2620 : Manufacture of computers and peripheral equipment
- 2630 : Manufacture of communication equipment
- 2640 : Manufacture of consumer electronics
- 2680 : Manufacture of magnetic and optical media
- 4651 : Wholesale of computers, computer peripheral equipment and software
- 4652 : Wholesale of electronic and telecommunications equipment and parts
- 5811 : Book publishing
- 5812 : Publishing of directories and mailing lists
- 5813 : Publishing of newspapers
- 5814 : Publishing of journals and periodicals
- 5819 : Other publishing activities
- 5821 : Publishing of computer games
- 5829 : Other software publishing
- 6110 : Wired telecommunications activities
- 6120 : Wireless telecommunications activities
- 6130 : Satellite telecommunications activities
- 6190 : Other telecommunications activities
- 6201 : Computer programming activities
- 6202 : Computer consultancy activities
- 6203 : Computer facilities management activities
- 6209 : Other information technology and computer service activities
- 6311 : Data processing, hosting and related activities
- 6312 : Web portals
- 6391 : News agency activities
- 6399 : Other information service activities n.e.c.
- 9511 : Repair of computers and peripheral equipment
- 9512 : Repair of communication equipment
- 9001 : Performing arts
- 9002 : Support activities to performing arts
- 9003 : Artistic creation
- 9004 : Operation of arts facilities
- 5911 : Motion picture, video and television programme production activities
- 5912 : Motion picture, video and television programme post-production activities
- 5913 : Motion picture, video and television programme distribution activities
- 5914 : Motion picture projection activities
- 5920 : Sound recording and music publishing activities
- 1820 : Reproduction of recorded media
- 3212 : Manufacture of jewellery and related articles
- 3220 : Manufacture of musical instruments
- 4763 : Retail sale of music and video recordings in specialised stores
- 6010 : Radio broadcasting
- 6020 : Television programming and broadcasting activities
- 7410 : Specialised design activities
- 7420 : Photographic activities
- 7430 : Translation and interpretation activities
- 9101 : Library and archive activities
- 9102 : Museum activities
- 9103 : Operation of historical sites and buildings and similar visitor attractions

Appendix B: Industry Classifications for the Tourism Sector

- 5510 : Hotels and similar accommodation
- 5520 : Holiday and other short stay accommodation
- 5530 : Camping grounds, recreational vehicle parks and trailer parks
- 5590 : Other accommodation
- 5610 : Restaurants and mobile food service activities
- 5621 : Event catering activities
- 5629 : Other food service activities
- 5630 : Beverage serving activities
- 9001 : Performing arts
- 9002 : Support activities to performing arts
- 9003 : Artistic creation
- 9004 : Operation of arts facilities
- 9101 : Library and archive activities
- 9102 : Museum activities
- 9103 : Operation of historical sites and buildings and similar visitor attractions
- 9104 : Botanical and zoological gardens and nature reserve activities
- 9311 : Operation of sports facilities
- 9312 : Activities of sport clubs
- 9313 : Fitness facilities
- 9319 : Other sports activities
- 9321 : Activities of amusement parks and theme parks
- 9329 : Other amusement and recreation activities