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| Subject: | Cultural Strategy Update |
| Date: | 9 September 2020 |
| Reporting Officer: | John Greer, Director of Economic Development |
| Contact Officer: | Eimear Henry, Senior Manager – Culture and Tourism |

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| Restricted Reports | |
| Is this report restricted? | Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| If Yes, when will the report become unrestricted? | |
| After Committee Decision | <input type="checkbox"/> |
| After Council Decision | <input type="checkbox"/> |
| Some time in the future | <input type="checkbox"/> |
| Never | <input type="checkbox"/> |

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| Call-in | |
| Is the decision eligible for Call-in? | Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> |

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| 1.0 | Purpose of Report or Summary of main Issues |
| 1.1 | <p>At a meeting of City Growth and Regeneration Committee in April 2020 the annual work programme to support year one of the ten-year cultural strategy for Belfast, <i>A City Imagining</i> was approved. Given the current circumstances and the specific ongoing challenges for the cultural sector, the purpose of this report is to update Members on:</p> <ul style="list-style-type: none">- The current status of the work programme relating to the delivery of the cultural strategy.- The current and projected impacts of Covid-19 on the cultural sector. |

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| | <ul style="list-style-type: none"> - The initial response and emerging priorities to help stabilise and support cultural development in the city. |
| 2.0 | Recommendations |
| 2.1 | <p>The Committee is asked to:</p> <ul style="list-style-type: none"> - Note the contents of this report and the contribution that the work programme for 2020/21 will make to supporting the recovery of the cultural sector. - Note the further detail supplied on specific projects within the overall programme and the breakdown and allocation of existing budget to specific projects as outlined at 3.27 and Appendix A. - Grant delegated authority to the Strategic Director of Place and the Economy to award grants up to a maximum of £20,000 following open and competitive processes in relation to specific projects within budgetary controls as outlined at 3.27 and in Appendix A. - Agree to make a submission to the Department for Communities on the impact of Covid-19 on the cultural sector including Council's position on emerging priorities and response as set out in this paper. |
| 3.0 | Main report |
| 3.1 | Members will be aware that at the August meeting of City Growth and Regeneration an update on tourism was presented with an agreement that a further update on cultural activity would be provided in September 2020. |
| 3.2 | A new ten-year cultural strategy for Belfast was approved by Council and became operational in April 2020 supported by a one-year work programme. The strategy was the culmination of extensive public and sector engagement. It recognised the need for long-term commitment over a decade in order to drive transformation. However, it also presented a dynamic model for change to ensure resilience to external factors and potential social, economic and environmental shifts. Consequently, while the full scale and impact of Covid-19 remains unknown and the level of structural change to the city's overall and cultural ecosystems is uncertain, the strategy remains valid presenting a strong framework for any recovery plans. |
| 3.3 | <p>Background</p> <p><i>A City Imagining</i> provides a framework for the city's transformation through cultural engagement and participation and supports wider council strategies such as the Belfast Agenda. It is now critical that the implementation of the strategy recognises the impact of Covid-19 on the cultural sector, responds accordingly and plans for long-term stability. The</p> |

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| | <p>strategic aims and projects contained within the strategy can now become vehicles for recovery if public and private sectors stakeholders work collectively to ensure that the sector is protected and supported whilst recognising the cultural dimension to successful economic and social recovery.</p> |
| 3.4 | <p>The immediate impact of the pandemic illustrated the importance of engaging with the arts and creativity. This reinforced the relationship with education, health and wellbeing highlighting that the personal and societal benefits of cultural participation cannot be wholly measured through an economic lens. The public health restrictions have limited the possibility of shared cultural experiences, and research has indicated that 93% of people surveyed felt that the absence of live events has had a detrimental impact on quality of life, highlighting the intrinsic value of arts, culture, events and festivals in our lives.</p> |
| 3.5 | <p>In addition, the cultural sector generates significant levels of revenue and ancillary work that supports employment and skills. As articulated in our cultural strategy, a vibrant cultural offer is core to the city's appeal locally, nationally and internationally and is a bedrock of our tourism and hospitality, which alongside the arts are currently one of the most challenged sectors in Belfast.</p> |
| 3.6 | <p>Current analysis of impact</p> <p>Whilst the impact of Covid-19 is ongoing, the majority of economic sectors are now operating again though often at reduced levels. Unfortunately, the cultural sector remains one of the sectors severely limited in what can be operationally delivered within the current restrictions. Should these limitations be reduced opening up the possibility of return of cultural programming, further work is still required to analyse the viability of re-opening and to better understand audience sentiment and confidence. Further consideration also needs to be given to the complexities associated with cultural engagement in a participatory environment.</p> |
| 3.7 | <p>The Arts Council has estimated that the cultural sector in NI is facing an estimated initial loss of box office income of £25 million and have stated that it could take up to a year-and-a-half for the arts sector to recalibrate itself after the crisis. Given the level of cultural infrastructure and workforce in Belfast this has clear implications for the city. Recent findings include:</p> <ul style="list-style-type: none"> - Cultural organisations in NI are reporting losses of £9.5 million in box office revenue to date since March. |

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| | <ul style="list-style-type: none"> - They also expect losses of £5.3 million in ancillary income. - On average, cultural organisations lost 72% of their anticipated 2020-21 box office revenue. - £1.3 million has already gone towards refunds and vouchers from cancelled performances or programmes this year. |
| 3.8 | <p>The business operating environment is extremely challenging across the city for all organisations due to the immediate impact on revenue streams and functionality. The ongoing restrictions on physical contact, cultural performances, group gatherings and public events have meant that the cultural sector and the hospitality and tourism sectors it works in tandem with, continue to have major barriers to re-opening and generating income. This includes not only box office but other investment such as sponsorship and project specific restricted grants. This should also be considered in the context of existing financial and operational vulnerabilities prior to Covid-19, including lower public investment in the arts in comparison with the rest of the UK and ROI and restricted ability to generate income due to regional audience reach and corporate footprint.</p> |
| 3.9 | <p>ACNI has also stated that as a result of the pandemic, the creative sector in Northern Ireland is projected to lose 20% (6,000) of its creative jobs and see a 23% (£300 million) drop in creative industries Gross Value Added, while the funded arts sector currently supports approximately 7,500 jobs as per the Annual Funding Survey 2018/19 published by ACNI. It must be borne in mind that the cultural sector also supports a huge range of individuals working freelance or as independent artists who are part of the overall ecology of the city. The timing of the pandemic has also coincided with organisations addressing the potential implications of Brexit on project and partnership development, revenue, and artist mobility. The long-term impact of the pandemic is as yet unknown however it is likely to include:</p> <ul style="list-style-type: none"> - Loss of sectoral knowledge (organisational) - Loss of talent (individuals) - Behavioural changes (audiences) |
| 3.10 | <p>Given the commitment set out in the cultural strategy and the role of Belfast in the region it is important that Council formulates a response to the pandemic that supports cultural recovery through mitigating actions in each of these areas that ensures practical support aimed at stabilisation as well as long-term strategic initiatives to support resilience and transformation.</p> |

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| <p>3.11</p> | <p>Summary of government support to date</p> <p><i>Department for Communities and Arts Council NI</i></p> <p>As the lead body to distribute central government cultural investment, ACNI has operated the Artist Emergency Programme (AEP), since April distributing up to £500,000 of National Lottery funding. Over 200 artists have so far benefited from grants of up to £5,000.</p> <p>ACNI have commenced distribution of a £4m funding package called the Creative Support Fund, allocated from Department for Communities to support the arts, creative industries and cultural sector during the current pandemic.</p> <ul style="list-style-type: none"> - This includes Individuals Emergency Resilience Programme (IERP), worth £1m from the Department for Communities and an additional £100,000 from Future Screens NI, offering individuals up to £5,000 each. - The Organisations Emergency Programme (OEP), is worth almost £2m to support 150 small and medium sized arts organisations with grants of up to £25,000 each. - Some resources are yet to be committed. |
| <p>3.12</p> | <p>In addition and as a result of the Barnett consequential Northern Ireland will receive a £33m support package as part of the £1.57 billion investment in cultural, arts and heritage announced by the Department of Digital, Culture, Media and Sport. The allocation of this funding will be determined by the Northern Ireland Executive.</p> |
| <p>3.13</p> | <p>In line with the Cultural Strategy for Belfast there is an opportunity for this funding to help mediate the current crisis whilst also supporting innovative approaches that will promote longer term stability, resilience and transformation in the cultural sector in order to overcome longstanding structural issues</p> |
| <p>3.14</p> | <p>Current status of restrictions</p> <p>On 12 May 2020, the NI Executive published a five-stage recovery plan to easing the current restrictions. This has been based on scientific evidence, the ability of the health service to cope, and the wider impact on our health, society and the economy.</p> <p>The current status of restrictions is updated regularly but currently still limits cultural engagement:</p> <ul style="list-style-type: none"> - Under the current regulations, theatres, live performances in active venues, and concert halls remain closed for audiences. These venues had been due to reopen |

on 8 August 2020 but this guidance was revised due to an increase in Covid-19 cases diagnosed.

- Indoor gatherings are restricted to six people from two households, and up to 15 people outdoors.
- Whilst museums, galleries, some sporting facilities and libraries have been able to reopen as long as they adhere to restrictions on capacity etc, some organisations have been reluctant or unable to open due to operational or physical adjustments required (e.g. staff being on furlough, limited staff for rotas, training, preparation of venues such as installation of signage, panels, etc)

Impact on programming and audiences

3.15

Attending live events and venues

Various recent UK-based reports (*After the Interval*, *Does Culture Matter*, and the Scotinform Cultural Survey) reveal that audiences are concerned about safety at indoor venues. Recent research has indicated that audiences wouldn't feel comfortable attending live cultural events even if restrictions were lifted, and this figure has held true during both 'early lockdown' (May through mid-June) and 'later lockdown' (mid-June through July). Only 16% of survey respondents were currently booking events. More than two thirds would feel more confident if measures were in place such as 2m distance, avoiding queues, hand sanitiser and signage, and limits on attendance. This in turn poses issues for cultural organisations in terms of the economic viability of operating events. Furthermore the majority of organisations deliver extensive engagement and participation based programmes. These introduce an additional layer of issues in terms of contact, interaction and social distancing.

Accessing cultural content online

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According to research (Thrive's *After the Interval* and NESTA), approximately half of people in the UK have never engaged with cultural content online, and of those, between 1/5 and 1/3 are new to online cultural content. This shows us that cultural organisations now have new audiences online, and this has been backed up through recent client surveys conducted by Thrive in partnership with Belfast City Council.

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It will be important for organisations to capture and maximise audience development opportunities as a result of this time of experimentation and new ways of engagement. However similar to other sectors while there is an ongoing need to build the digital capability of the cultural sector this is not a long-term replacement for live performance.

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| 3.18 | <p><i>Innovation</i></p> <p>Many of the city’s cultural organisations have demonstrated great resilience in the face of challenge including new online platforms, digital engagement, and experimenting with open air events such as promenade theatre, inside-out galleries and cinemas, drive-ins and open-air cultural events. Many arts organisations have demonstrated their ability to adapt their business and operating model to engage audiences in new ways.</p> |
| 3.19 | <p>Festivals and other organisations across Belfast have attracted new audiences and increased reach connecting with new audiences in US, Australia, and Singapore through digitised programmes. Despite challenge most of Belfast’s festivals are still taking place by operating ‘blended’ programmes and experimenting with different presentation models. Festivals such as Feile an Phobail and ArtsEkta’s Mela broadcast high quality performances online of differing lengths and artforms, whilst EastSide Arts Festival hosted socially distanced outdoor events.</p> |
| 3.20 | <p>However, we also know from the Belfast Baseline research into audience engagement that there remain sections of society less likely to actively participate in the breadth of cultural life. An additional factor such as the current pandemic can increase access issues. Belfast’s arts organisations have again taken innovative approaches to staging performances to engage those most vulnerable in our society and hard to reach audiences. For example, Replay Theatre Company are touring the homes of families with children with complex needs and performing in gardens /public spaces. Implementing the necessary safety measures live performances have also reached outdoor settings at care homes and hospitals.</p> |
| 3.21 | <p>Belfast City Council Response</p> <p>While government continues to take the lead on delivering direct support package it is important that Council is active in supporting cultural recovery through:</p> <ul style="list-style-type: none"> - Engagement with the sector - Reframing of existing work programmes to ensure that they effectively support recovery - Advocacy and strategic input into wider regional responses and interventions. |
| 3.22 | <p>To date the work programme agreed by the City Growth and Regeneration Committee in April 2020 has provided critical support to the cultural sector. This has included</p> |

administering of grants to support core and programme costs as well as ongoing development work in a number of areas:

- Cultural organisations have benefitted from Belfast City Council support through *A City Imagining* cultural strategy investment programme including commitment of full or majority of core funding in 2020/21 to:
 - o 49 arts and heritage organisations, (11 one-year Transition grants, 9 four- and 29 two-year Cultural Multi Annual Grants)
 - o 18 festivals and events (2 one-year grants, 4 four- and 12 two-year Cultural Multi-Annual Grants)
- Engagement with stakeholder groups in order to gather information and ascertain the cultural sector's needs over the short and longer term to ensure effective implementation of strategy.
- Development and delivery of the following programmes of support to directly target sectoral need at this time in line with work programme presented to Committee in April 2020:
 - o Delivering sectoral capacity building programme rescoped to ensure impact of Covid-19 is addressed.
 - o Supporting new collaborations and artistic development including up to four long-term cultural commissions exploring themes celebrating the city, building towards 2023.
 - o Ongoing review of city events including Culture Night Belfast and Belfast Maritime Festival including identifying new models of delivery.
 - o Delivering cultural animation programme to support city centre and neighbourhood recovery supported by Department for Communities Revitalisation funding.
 - o Ensuring strategic alignment between cultural strategy and new 10 year tourism recovery plan including maximising opportunities for sustainable tourism development through local and cultural initiatives.
 - o Developing leadership, capacity and profile for the wider music sector considering the high level of impact on this sector.
 - o Commissioning research into new approaches to audience development including new ticketing model and integration of digital models piloted during pandemic.
 - o Cultural mapping including infrastructure audit to identify cultural facilities and activities, and utilise digital innovation to create a civic resource and promote cultural engagement and participation across the city.

- Ongoing support for city and sectoral local, national and international work through existing and new partnerships and collaborations.

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Responding to the pandemic

It is however important to note that the work programme as set out in April 2020 required further project design and development with a view to further updates being provided to Committee as appropriate. This work has been ongoing and has provided an opportunity where appropriate to rescope commitments in light of the impact of Covid-19. Further detail on this work programme and how it is responding to the specific needs and priorities emerging from the pandemic is included at Appendix A.

3.24

It has been categorised into 6 main strands of work in line with existing approvals and budget. These are:

Strand 1: Stabilisation by optimising existing organisational support programmes and ensuring a joined up response across public and private stakeholders including:

- Administration of CMAG grants and wraparound support service
- Cultural mapping and audit

Strand 2: Developing the sector through opportunities to support new, emerging and transitioning organisations including:

- Award of up to 4 development grants at a maximum value of £20,000

Strand 3: Increasing capacity through tailored, cross-cutting and new approaches to co-design including:

- Delivery of capacity building programme targeting agreed groups and cognisant of the impact of Covid-19.

Strand 4: Rewarding innovation through support programmes specifically targeting individual artists, practitioners and producers including:

- Award of 10 creative bursaries in support of strategic initiatives such as 2023 and City of Music.

Strand 5: Building audiences through increased understanding, research and engagement including:

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| <p>3.25</p> <p>3.26</p> <p>3.27</p> <p>3.28</p> <p>3.29</p> | <ul style="list-style-type: none"> - Commission detailed audience research to ascertain the longer term impacts of Covid-19. <p>Strand 6: Promoting cultural place-making through the delivery of cultural animation, activation and programming in the city centre and neighbourhoods.</p> <ul style="list-style-type: none"> - This is a new strand of work in direct response to Department for Communities Revitalisation Fund however it is clearly aligned to existing priorities within the cultural strategy linked to use of public space and cultural participation. <p><u>Financial & Resource Implications</u></p> <p>There are no new financial implications. The activities outlined in this report will be resourced from the 2020/21 budget for the Culture and Tourism section of the Economic Development division of the Place and Economy Departmental budget in line with the work programme approved in April 2020.</p> <p>However, this report presents an additional level of detail aligned to existing approvals following programme design and consideration of the impact of Covid-19 as set out at 3.24 and in Appendix A including:</p> <ul style="list-style-type: none"> - 4 development grants at a maximum of £20,000 per grant - 10 creative bursaries at a maximum of £10,000 per bursary - Audience data and research in partnership with Thrive at a maximum of £30,000 <p>All existing programmes are subject to ongoing review with cost savings identified where projects cannot proceed due to Covid-19.</p> <p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p> <p>The cultural strategy, <i>A City Imagining</i> has been subject to an Equality Impact Assessment (EQIA) and a Rural Needs Assessment (RNA). Any further investment or significant programmes will include equality screening as appropriate.</p> |
| <p>4.0</p> | <p>Appendices – Documents Attached</p> |
| | <p>Appendix A: <i>A City Imagining</i> - Supporting cultural recovery</p> |