



This report summarises the work to date of Culture East Sussex (CES) and seeks support in principle for future plans.

1. The Cultural Sector and Visitor Economy in East Sussex

- The UK's creative industries are a global success story generating over £101bn for the UK economy – equivalent to £11.5m per hour. They export £46bn in goods and services worldwide. Over the last decade the sector has grown twice as fast as the UK economy as a whole. It is estimated that the sector will be worth £130bn GVA by 2025 as international demand continues to grow. The sector expects to create one million more jobs by 2030.
- The creative industries also sit at the heart of a wider creative economy which employs over three million people and generates value across supply chains.
- Currently there is very little East Sussex-specific data on the creative industries sector.
- Beyond economic benefits, the creative industries continue to tackle regional inequalities, build communities across the UK, and enable individuals to lead lives that are happier, healthier, more sociable, and enriched through access to culture and creativity. Cultural engagement is proven to achieve improved health and wellbeing outcomes for residents, underpinning a sustainable economy.
- The visitor economy in East Sussex has a total business turnover of £1.42bn and supports over 30,000 jobs. The total GVA of the visitor economy was £1.745bn in 2016. This is an increase of £244m since 2013 and is 18.3% of all GVA in the county (circa £10bn). There were 4,240 visitor economy businesses in 2017, an increase of 225 since 2014.
- In 2015 there were 23.6 million visits to the county. These visitors spent £1.1bn, with 55% as day trips and 45% from overnight stays. Nearly 50% of staying visitors come from within the South East region.
- Research indicates that Cultural Tourism is one of the main reasons why visitors choose to come here, with museums and art galleries attracting the largest visitor numbers (25%).
- There are over 180 visitor attractions in the county, including parks and gardens, castles and stately homes, galleries, theatres, piers, museums, farms and vineyards – including Ridgeview, winner of 'Winemaker of the Year' at the International Wine and Spirit Competition 2018.
- There were 8,030 education & training starts in 2016/17 in visitor economy related courses, an increase of around 1,500 on 2015/16 and the first time that the number of starts has increased since 2012/13.
- The cultural tourism offer sustains footfall to hospitality, retail and vineyards, generates year-round visitor appeal and helps to attract and retain businesses, supporting recruitment and retention.

2. Culture East Sussex (CES)

Culture East Sussex was formed in July 2014 to pool collective experience and knowledge in order to advise on and monitor the implementation of the East Sussex Cultural Strategy 2013-23. To date there have been many significant partnership achievements including:

- Sussex Modern shared marketing, expanded in 2019 to include co-promotion with Sussex Wineries.
- East Sussex Coastal Culture Trail.
- £54m redevelopment of Devonshire Quarter in Eastbourne.
- £7.9m growth of Charleston to be a year-round attraction with gallery, auditorium and bigger café.
- £1m attracted for Inn Crowd – live touring professional shows to local pubs.
- Gatwick Gateway itineraries on Gatwick website and local images on vinyl in Gatwick Arrivals summer 2019.
- £1.2m+ England's Creative Coast bringing together SELEP and West Sussex to deliver an art and geocache trail to attract international visitors and increase tourism spend.

- £5.157m South East Creatives (South East Creative, Cultural and Digital Support / SECCADS) SELEP-wide business support programme; to date 10 grants awarded to East Sussex SMEs (£56.8k), 2 East Sussex SMEs receiving mentoring for job creation, 7 business engagement events and 12 hours of business support delivered.
- £20m of Arts Council England investment in National Portfolio Organisations (3 new National Portfolio organisations established: Applause, Hastings Contemporary and Home Live Art).
- East Sussex Tourism Data Warehouse.
- National Explorers programme led by Project Art Works making mainstream galleries more accessible to people with disabilities.
- National Outlands experimental music touring network led by De La Warr Pavilion.
- Culture East Sussex becoming an Arts Council England supported Cultural Education Partnership focussing on Skills, Health and Wellbeing.
- Cultural venues soon to host public health consultants.

Recent opportunities have raised questions about whether the current structure of Culture East Sussex is fit for purpose to maximise our role as an enabler.

- Cultural Development Fund (CDF) – East Sussex coastal application highlighted the need for a county-wide framework for cultural planning and governance (second round due 2020 – £90m).
- South East Local Enterprise Partnership (SELEP) Economic Strategy Statement 2019.
- SELEP Local Industrial Strategy (LIS) development.
- South East Creative Economy Network (SECEN) Prospectus refresh.
- UK Shared Prosperity Fund expected to be introduced post-Brexit.
- East Sussex Growth Strategy 2014-2020 and refreshed strategy for 2020+.
- Arts Council England’s new 10 Year Strategy.
- East Sussex Cultural Strategy Action Plan.
- Channel 4 bid.
- Review of Local Cultural Education Partnerships.
- Future bids to Government-funded programmes such as Stronger Towns Fund, Future High Streets Fund and others.

3. South East Creative Economy Network (SECEN)

SECEN is the sector-led Creative, Cultural and Digital sub group of SELEP. This network is delivering a number of high profile work packages which inform, complement and require the engagement of CES membership:

- Current refresh of the SECEN Prospectus supported by SELEP’s Sector Support Fund (SSF).
- Contribution to the development of the SELEP Local Industrial Strategy.
- Creative Open Workspace Masterplan (in partnership with Thames Estuary Production Corridor).
- South East Creative, Cultural and Digital Sector (SECCADS) / South East Creatives business support programme.
- England’s Creative Coast.
- Talent Accelerator – skills development for the Creative, Cultural and Digital Sector.

4. Cultural Investment Framework (CIF)

CES has a number of work packages that it aims to develop over the next ten years. These include but are not limited to:

- Commission East Sussex specific research to understand the sector’s current performance and future needs.

- Develop a network of flexible workspaces to support local creative, cultural and digital businesses (in line with the SECEN Open Workspace Masterplan).
- Grow creative businesses through business support initiatives (legacy of South East Creatives).
- Talent Accelerator – support a creative skills ladder in partnership with Skills East Sussex and SECEN.
- Cultural Tourism packages – linked to inward investment, recruitment and retention.
- Place making – enable the sector to be market leaders in the development of a sustainable economy.
- Work with planners and developers to enable infrastructure improvements to achieve growth.
- Health and wellbeing programmes, linked to public health and social care.

To deliver these work packages CES will be seeking support for strategic investment in cultural assets. The support required includes financial investment, sympathetic planning policy and cooperation across disciplines. A Cultural Investment Framework (CIF) would:

- Be a formal and transparent pipeline process for cultural ambitions.
- Be underpinned by needs analysis.
- Provide county-wide oversight initiatives.
- Identify priorities/timescales.
- Set out a series of gateways or milestones, developing credibility until projects are ready for investment.

5. Governance

In considering the need to develop a CIF it has become clear that if Culture East Sussex is to own and manage a CIF it requires a more formal governance structure to ensure:

- A vision – in order to determine the future direction and vision for Culture East Sussex.
- A more transparent membership criteria achieving representation that reflects the diversity of the sector and the wider population.
- An accountable decision-making process.
- Tools to engage a wider set of constituents in contributing to the CIF in the future.
- Best use of all those people who belong to the Board and/or attend the meetings.

6. Next Steps

CES will commission an external consultant to take stock, in consultation with the current membership, to determine the future direction or 'vision' of Culture East Sussex, refining and possibly adding to the ambitions and work packages described in this report. CES members have agreed to:

- Review the governance and recruitment model for Culture East Sussex.
- Consider options to introduce a legal framework for Culture East Sussex.
- Commence development of a Cultural Investment Framework.

This is a natural evolution for CES which now requires a governance model that will empower its combined membership to achieve greater positive impact on the East Sussex economy.

7. Recommendation

Team East Sussex is asked to endorse the approach that Culture East Sussex is taking in developing a governance model and Cultural Investment Framework that will enable alignment with TES's own governance and decision-making processes.

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