

Strategic Plan for

Arts, Heritage, Sports, Visitor Economy, Cultural and Creative Industries

Enhancing the Quality of Life and growing
the Economy in the South East Midlands

Foreword

The South East Midlands is an area rich in arts, heritage and culture comprising a diverse range of natural assets, visitor attractions, world-class sporting facilities and a growing craft and creative industries sector.

Nationally and internationally successful arts organisations such as The Stables and the Milton Keynes Theatre and Gallery sit alongside well-loved local venues like the Royal & Derngate Theatre in Northampton, the Corby Cube and the Aylesbury Waterside Theatre.

Globally recognised iconic brands such as Silverstone for motorsport and Bletchley Park, birthplace of computing and home of the Codebreakers mix with the classic historic homes of Woburn Abbey, Althorp House and Wrest Park.

Modern day family and leisure attractions can be found at Whipsnade Zoo and Dunstable Downs, and the area's natural landscape offers massive scope for enjoyment whether on the water of the Grand Union canal or on foot along the Ridgeway long distance footpath.

Close proximity to London and Birmingham has encouraged the development of a thriving cultural and creative industries sector, which provides employment to around 82,600 people across the area.

The South East Midlands Local Enterprise Partnership (SEMLEP) recognises the immense value of Arts, Heritage, Sports, Visitor Economy, Cultural and Creative (AHSVEC&C) industries to the area, not simply in terms of direct impact on the local economy and Gross Value Added (GVA) but also for the less statistically quantifiable benefits these sectors bring such as enhancing the quality of life and wellbeing of residents and the consequent appeal of the South East Midlands to visitors and investors.

This Strategic Plan celebrates the rich mix of diverse and interrelated sectors. It encourages individual leaders and their organisations to seek common cause and carve out shared creative space to better exploit, on behalf of the larger collective endeavour, the advantages of working collaboratively across geographical and sectoral boundaries.

We want to build on the successes of all our partners and encourage you to work with us, and with national organisations such as Arts Council England, VisitEngland and Sport England, to invest more time, energy and resources in the AHSVEC&C industries across the SEMLEP area.



Dr Ann Limb OBE DL
Chair of SEMLEP



Tom Wells
Board Member and
Strategic Lead for
Creative & Cultural Sector

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Executive Summary

Arts and culture are powerful forces for building confidence and nurturing imagination and identity as well as bringing communities together and forging a sense of place and ambition. Participation in creative activity or in sport improves physical and mental wellbeing as well as contributing directly and indirectly to the local economy. This is therefore, by design, a Strategic Plan for the Arts, Heritage, Sports, Visitor Economy, Cultural and Creative (AHSVEC&C) industries.

Compared to some of the better-established visitor and cultural hotspots of the United Kingdom, the South East Midlands has a wealth of cultural assets that can come as a surprise to both visitors and residents.

The area offers historic beauty such as at Woburn Abbey and Northampton's Guildhall; it provides diversity - the historic Rothschild collections at Waddesdon Manor contrasting with contemporary arts programmes at Milton Keynes Gallery. An impressive range of elite sporting activities can be found here too from football clubs such as Luton Town FC and Northampton Town FC, from rugby at Northampton Saints RFC and Bedford Blues RFC to horse racing at Towcester Racecourse, from motor sport at Silverstone and extreme sports at BodyFlight Bedfordshire. Milton Keynes is home to Badminton England and Table Tennis England and will also be hosting three matches of the Rugby World Cup 2015 at stadium:mk. A major new biennial International Festival in Milton Keynes has recently joined well-established family favourites such as the Luton Carnival and the Bedford River Festival and the area is home to world firsts - Bletchley Park, the birthplace of computing and Stoke Mandeville, home of the Paralympics. Alongside these major attractions, the South East Midlands offers a plethora of scenic rivers, waterways, gardens, landscapes, historic town centres and churches.

This Strategic Plan quantifies the direct economic impact of the AHSVEC&C industries in terms of jobs, businesses and turnover by sub-sector and by geographical area. It provides examples of some of the area's diverse range of attractions and assets. It highlights, through a selection of case studies, evidence of the wider economic benefits of these. It also describes some of the less easily quantified benefits of these sectors on the attractiveness of the area to businesses and the impact on the quality of life of residents.


Our primary objective is to encourage growth in the AHSVEC&C industries through greater collaboration, both locally, with other Local Enterprise Partnerships (LEPs) and organizations, and with national bodies such as the Arts Council England, English Heritage, Sport England and VisitEngland. By demonstrating the value of the diverse opportunities across the area, SEMLEP hopes to lever in more resources collectively thereby delivering greater economic benefits to all.



This Strategic Plan encourages the SEMLEP local authorities and their cultural partners to have a shared sense of being part of a bigger picture. SEMLEP does not seek to duplicate the excellent work being carried out as local authorities deliver their arts, heritage, cultural and sporting strategies.

Our aims are:

- to improve the evidence base that demonstrates the value to the local economy of the Arts, Heritage, Sports, Visitor Economy, Culture and Creative industries,
- to boost the existing levels of knowledge and skills required for these sectors to flourish and grow and,
- to focus attention on those projects that can be delivered most effectively by working collaboratively.



The development of an Action Plan and its subsequent implementation will be taken forward by SEMLEP's Cultural and Creative Industries group, chaired by the SEMLEP Board lead for this sector, Tom Wells, with input from our Sport and Leisure Sub-group, our Skills Forum and local businesses.

Background

01

The South East Midlands (SEM) is a functional economic area consisting of 11 local authorities with a combined population of 1.7m. SEMLEP is an economic development partnership led by the private sector with the prime aim of enabling economic growth.

SEMLEP's Strategic Economic Plan, which was published in March 2014, set out the strategic objectives for SEMLEP. These focus on delivering jobs and growth by providing the enabling infrastructure to encourage new start-up businesses, helping existing businesses to grow and stimulating inward investment. The Strategic Plan identifies four key sectors where SEMLEP has the greatest potential for growth. One of these is the Arts, Heritage, Cultural and Creative (AHSVEC&C) industries including sport and the visitor economy.

This Strategic Plan takes that sector and sets out the aims and objectives for SEMLEP to support these sectors and enable growth. It sits alongside the Skills Strategy for SEMLEP.

The AHSVEC&C industries contribute significantly to the economy of the South East Midlands. There are over 9,600 cultural and creative enterprises with a combined turnover of £2.5bn employing around 27,000 people. The Visitor Economy in the South East Midlands supports around 59,400 jobs accounting for about 8% of total jobs. Section 3 provides more information about each sector and Section 4 highlights some of the key assets in each of the sectors and outlines, through the use of example case studies, the contribution of events such as their impact on the wider economy.

02

Vision, Aim and Objectives

The Vision for SEMLEP is to reinforce and develop the South East Midlands (SEM) as one of the most innovative, successful and high performing economies in England by 2020.

The Aim of this Strategic Plan is to outline the high level objectives for the Arts, Heritage, Sports, Visitor Economy, Cultural and Creative (AHSVEC&C) industries to enable them to play a vital role in delivering this Vision for SEMLEP.

Objective 1:

To identify and quantify the direct and indirect economic benefits of the AHSVEC&C industries to the SEM area.

Objective 2:

To assess the qualitative impact of the AHSVEC&C industries on decisions by people and businesses to locate in this area via our Business Survey and other research.

Objective 3:

To join up businesses, local authorities and representative organisations with an interest in the AHSVEC&C industries to enable them to operate collaboratively across the area to increase the economic potential of the sector.

Objective 4:

To work closely with national organisations such as the Arts Council England, Sport England and VisitEngland to identify funding opportunities (including European Funding) in this area to support business ambition, training and growth.

Sections 3 and 4 of this document start to address Objectives 1 and 2 by establishing an evidence base and some example case studies of the economic impact of events such as the IF: Milton Keynes International Festival. However, there is scope for more detailed analysis and some further in-depth studies.

Section 5 explains how these high level objectives will be turned into a detailed Action Plan with SMART targets. This work will be steered by the Cultural and Creative Industries Group together with the Sport and Leisure Sub-group.

0.3 Contribution of each element to the SEMLEP economy

Overview

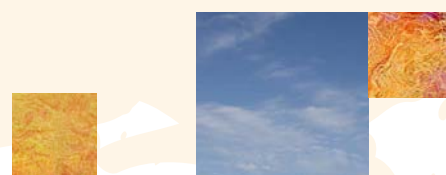
The Arts, Heritage, Sports, Visitor Economy, Cultural and Creative (AHSVEC&C) industries represent a diverse mix of sectors who play a crucial role in supporting the national economy in terms of attracting inward investment, supporting business start-ups, creating jobs and making the country an attractive place to do business, visit, study and live. In fact the attractive surroundings of the South East Midlands was one of the top five aspects rated by businesses surveyed on behalf of SEMLEP about what is good about doing business in the area.

The rationale for focusing on all of these sectors together is because they represent a collective offer to the South East Midlands economy. For example, the Arts and Heritage sector makes a vital contribution to the Visitor Economy as well as providing a platform for the Creative sector to grow and collaborate with these sectors. The Sports sector also contributes to the Visitor Economy.

The nature of these sectors overlap each other in many ways and by working together collaboratively they support the many sub sectors within these industries by, for example, showcasing their strengths on a national and international level, providing space for new businesses to start up, providing a supply chain and creating new jobs and skills locally.

London 2012 Games

An example of how these sectors have supported each other was the Olympic and Paralympic Games 2012. This provided an international platform to showcase the strengths, opportunities and unique character of each sector and collectively their contribution to the national economy in terms of attracting inward investment, supporting businesses to grow and compete internationally, diversifying the supply chain and attracting visitors.



In 2012, there were 3,002,200 people¹ employed in the AHSVEC&C industries in England. This accounted for 13% of total employment and an increase of 1% from the previous year. The top 3 sub sectors with the greatest number of employees in 2012 were Food and Drink (42%), Digital (12%) and Accommodation (11%).

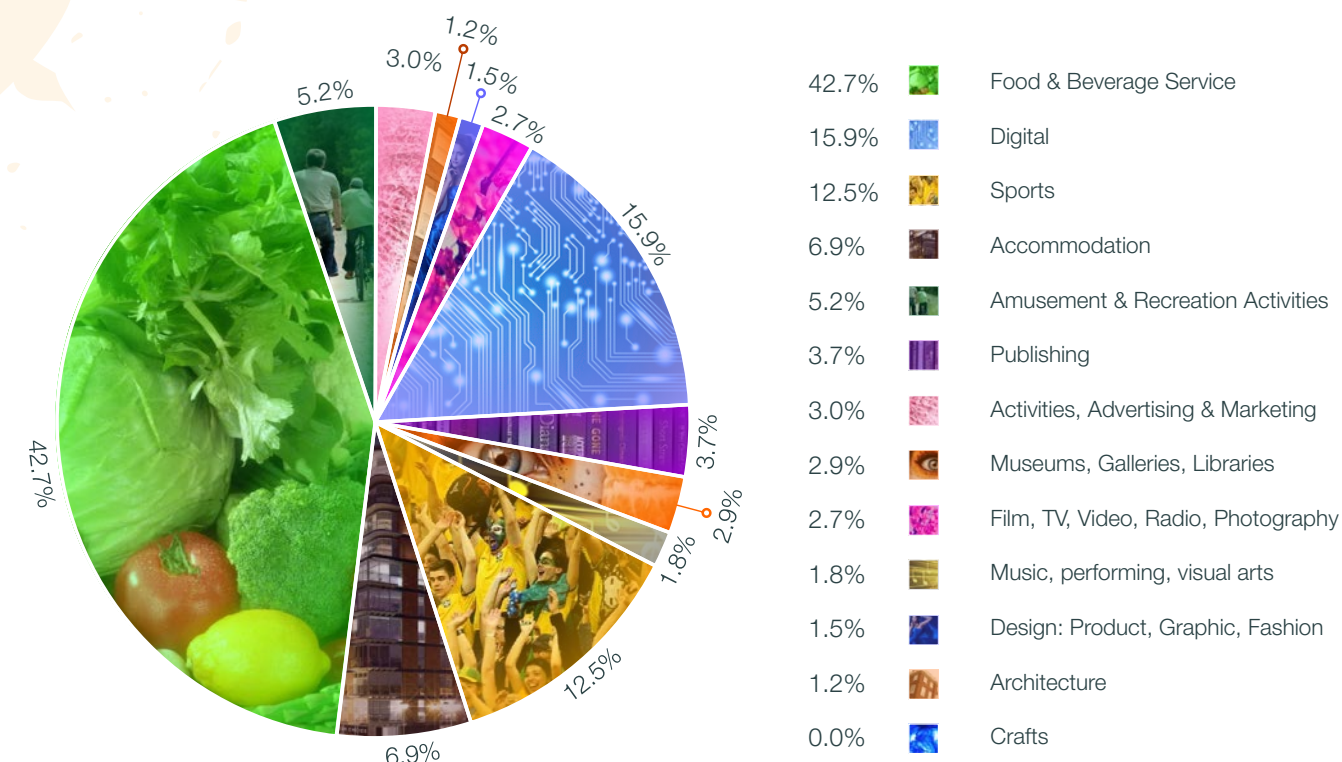
South East Midlands

1. JOBS

Around 1 in 10 (11%)² of the total working age population are employed in the Arts, Heritage, Sports, Visitor Economy, Cultural and Creative (AHSVEC&C) industries in the South East Midlands.

- Food and Drink (35,300), Digital (13,100) and Sports (10,300) sectors employ the most people compared to all other sectors within AHSVEC&C.
- Over the past year some sectors with a much smaller workforce have seen the greatest jobs growth in particular both Design (+71%) and Film, TV, video, radio and photography sectors (+43%).
- Food and Drink is a key sector for Bedfordshire and most of Northamptonshire with over 14,000 people employed.
- Aylesbury, Cherwell and Milton Keynes have the greatest number of people employed in the Digital sector at just under 6,000 people in Milton Keynes and 2,600 people employed in Aylesbury and Cherwell in 2012.
- The number of people employed in Advertising and Marketing is at least three times greater in Aylesbury and Cherwell than anywhere else in the South East Midlands which would suggest a strong business cluster in this area for this particular sub sector.

Chart 1: Percentage of employment by sub sector, South East Midlands



Source: Office for National Statistics, Business Register Employment Survey 2012

¹ Office for National Statistics, Business Register Employment Survey 2012

² Ibid.



2. BUSINESS

General overview

There are over 17,300 businesses³ within the Arts, Heritage, Sports, Visitor Economy, Cultural & Creative (AHSVEC&C) industries in the South East Midlands. The majority of businesses are small (66%) employing under 50 people. At the same time, almost a quarter (21%) are large businesses employing over 250 people.

In 2013, business turnover was £4.1 billion⁴ representing a 5% increase from the previous year with the greatest turnover in Digital, Sports and Accommodation sectors.

Business within AHSVEC&C industries continue to grow in terms of turnover and accounted for around 3% of total business turnover of all businesses in the South East Midlands in 2013.

Over half of the businesses are within the Creative sector (52%), around a quarter within Food and Drink (26%) and almost one fifth of businesses are within Arts, Recreation and Accommodation (18%).⁵

Creative Sector

- The Creative sector has the biggest number of micro businesses in the South East Midlands compared to all other sectors in AHSVEC&C with the greatest proportion of micro businesses in Design: product, graphic and fashion design (87%). This may be influenced by strong supply chain links with major cities such as London.
- Bedfordshire, Aylesbury and Cherwell have the strongest clusters of businesses within the Creative sector.
- In particular Bedfordshire has the greatest number of Film, TV, radio and photography businesses compared to anywhere else in the South East Midlands. This may be due to its close proximity to the M1 and London as an alternative and more affordable and spacious location for such high value companies, their close proximity to major film studios such as Warner Bros. Studios in Leavesden and access to major arts and heritage sites as attractive backdrops for Film and TV productions.
- Whilst Food and Beverage, Digital and Sports employ the greatest number of people, this is not reflected in business turnover over the past year. Both Advertising and Marketing and Film, TV, video, radio and photography have seen the biggest increase in turnover.



Food and Drink

- Bedfordshire and Daventry, South Northamptonshire and Northampton has the biggest cluster of Food and Drink businesses. This may be partly due to their proximity to well-known food and drink manufacturing businesses that form part of their supply chain as well as their location within attractive natural surroundings and easy access to major visitor attractions such as Woburn Abbey, Silverstone and Althorp House.

Visitor Economy

- Between 2010 and 2012, there were on average just under 2.5 million domestic trips taken each year to the South East Midlands. This equated to 5.8 million nights per year and the annual value of these trips was £312 million.⁶
- Business Tourism plays an important role nationally and locally in attracting both visitors and inward investment. In 2010 the Exhibition sector generated £11 billion in spending, £5.6 billion Gross Value Added (GVA) to the UK economy and supported 148,500 jobs in the UK.⁷
- Visitor Economy is of growing importance to the South East Midlands with some places such as South Northamptonshire accounting for 15% of total employment in the local area, around £125m economic contribution and 3.5 million visitor days.

Sports sector

- It is estimated that the sports sector in the South East Midlands accounts for around £683m of consumer spend, providing over 18,000 jobs and around £543.7m GVA⁸.
- The sector is particularly important in terms of jobs for areas such as Daventry, Northampton and South Northamptonshire which collectively employ the greatest number of people in this sector (3,000)⁹. This is not surprising given the significant impact of Silverstone and other key sports assets as a driver for jobs.

Heritage sector

- Renewed interest in the Heritage sector in recent years has stimulated demand in more traditional skills such as heritage building and crafting skills.¹⁰

³ Experian Market IQ Business Data 2013
⁴ ONS, Inter Departmental Business Register, 2013
⁵ Ibid.

⁶ VisitEngland, Great Britain Tourism Survey 2010-2012
⁷ Oxford Economics, The Economic Impact of the UK Exhibitions Industry, February 2012
⁸ Sports England 2013
⁹ Office for National Statistics, Business Register Employment Survey 2012
¹⁰ Skills Needs Analysis 2013: Repair, Maintenance and Energy Efficiency Retrofit of Traditional (pre-1919) Buildings in England and Scotland



3. SKILLS

The Arts, Heritage, Sports, Visitor Economy, Cultural and Creative (AHSVEC&C) industries attract a predominantly highly skilled workforce (63%)¹¹ due to the professional and technical skills required for most of the occupations within these sectors.

The greatest proportion of people employed in higher skilled occupations for these industries are within Advertising and Marketing, Digital and Design. In comparison the majority of those employed in the Food and Drink and Entertainment and Recreation sector are within lower skilled occupations.

Due to issues around sample size associated with the Annual Population Survey, we are unable to gain a complete picture of gender breakdown for each occupation, however existing data highlights differences between men and women for some sub sectors. Men are more likely to work in the Digital sector than women at a national level. This is also true at a South East Midlands level where 86%¹² of those employed as IT business analysts and programmers are male compared to 14% of females. However representation within the Creative sector tends to be more balanced. Further investigation into the level of representation of women and men in particular sectors needs to be carried out in order to establish a more robust baseline.

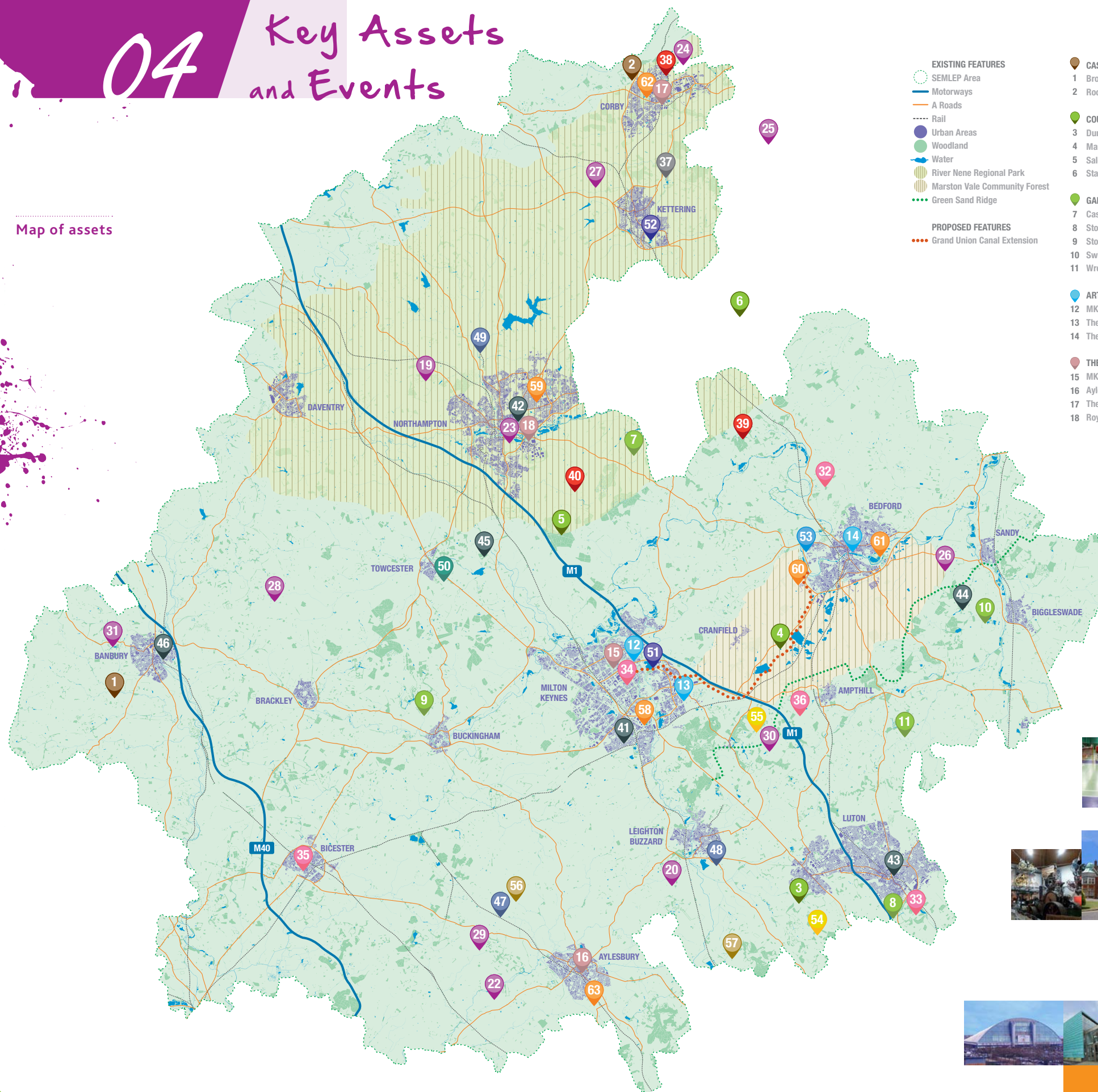
Despite having an overall highly skilled workforce, each sector faces a number of existing and future skills and recruitment challenges nationally:

- The nature of work in the Creative sector tends to result in a higher level of self-employment and the majority of businesses tend to be micro employing under 10 people. As the demand for the sector to keep pace with advances in technology gathers momentum, this will require higher level technical skills and represents a challenge for such micro businesses with superfast connectivity being one of the greatest.¹³
- We know from national and local data that small and micro businesses have a lower uptake of Apprentices. According to the Federation of Small Businesses (FSB), businesses are 'not very confident' or 'not at all confident' that students leaving school would have the right level of employability skills and believe that an apprentice wouldn't be right for their industry. This may be the case for the Cultural and Creative sectors who are predominantly small and micro.¹⁴
- High staff turnover and lack of job specific skills, customer service skills, team working skills and planning and organisation skills are a major issue for the Visitor Economy and Sports sector.¹⁵
- The Visitor Economy and Sports sector are forecasted to grow at a faster rate than the economy as a whole with the fastest growth in higher skilled occupations, with 32% growth in professional occupations, 26% in associate professional and technical, 24% in caring, leisure and other service occupations, and 19% in managers, directors and senior officials.¹⁶
- The Digital Sector faces a number of skills shortages namely job specific, technical and practical skills.¹⁷
- Whilst there has been a growth in the number of businesses within the Heritage Craft sector in recent years, there is a concern that traditional craft skills may be lost as the majority (77%)¹⁸ of businesses do not undertake activities to pass on craft skills and knowledge to people outside of the business.

¹¹ Office for National Statistics, Annual Population Survey 2013
¹² Office for National Statistics, Annual Population Survey 2013

¹³ Source: Creative and Cultural Skills, Building a Creative Nation: Evidence Review, 2013
¹⁴ Federation of Small Business, Small Business Survey 2012
¹⁵ UK Commission for Employment and Skills, Hospitality, tourism and sport sector: Sector Skills Assessment 2012, October 2012
¹⁶ Ibid.
¹⁷ UK Commission for Employment and Skills, Sector Skills Insights: Digital and Creative, July 2012
¹⁸ Department for Business Innovation and Skills, Mapping Heritage Craft The economic contribution of the Heritage Craft sector in England, October 2012

Map of assets



There are too many amazing and diverse assets and attractions both small and large to mention each individually. Below one or two examples are provided in each sector with a spread across the SEMLEP area.



ARTS

MK GALLERY

MK Gallery is an educational charity. Each year, it engages 30,000 people in a positive experience of the arts; enabling people to learn about, participate in and enjoy the arts in all their forms. MK Gallery presents free, high quality, thought-provoking exhibitions by world class contemporary artists. It also delivers hundreds of talks, workshops, film screenings, live music and spoken word events each year for children and adults, mostly free, together with a programme of community exhibitions in its Project Space.



THE STABLES

Since its charitable status foundation in 1969 by Sir John Dankworth and Dame Cleo Laine, The Stables has been highly successful in achieving its vision to provide a centre for playing, enjoying and learning about music in all its forms. It has attracted some of the most prestigious performers on the world stage, establishing a reputation for consistently high-quality performances.



It now delivers over 350 concerts and over 250 learning and participation sessions each year attracting over 100,000 visitors annually from all over the UK and overseas. It is ranked 4th by the Performing Rights Society in the UK's top 100 music venues and has a reputation for supporting the development of new and emerging artists.

The Stables is also responsible for founding and producing the biennial IF: Milton Keynes International Festival working with partners across the city to deliver 10 extraordinary days of unusual events in unexpected places. Each edition of the Festival has delivered an economic impact in excess of £4 million, with audiences of over 90,000 and PR coverage valued at over £1 million.

UK CENTRE FOR CARNIVAL ARTS

The UK Centre for Carnival Arts (UKCCA) is a home dedicated to Carnival Arts, communities, learning and enterprise. Carnival involves highly skilled art forms across music, movement and costume. These art forms are rooted in traditions spanning the globe. This is the first dedicated organisation and centre of its kind, promoting excellence within the field of carnival arts in all its professional forms.



CREATIVE

THE MILL ARTS CENTRE

The Mill Arts Centre is located in the heart of Banbury.

Housed in a converted grain mill alongside the regenerated Oxford Canal, The Mill offers modern facilities in a venue steeped in character, charm and history.

The Mill runs a successful professional programme of music, drama and dance as well as offering a range of rooms and support facilities to local businesses. Education and training are key priorities for The Mill which offers over 40 workshops on a weekly basis as well as work placements and industry training.



PORTFOLIO INNOVATION CENTRE

The Portfolio Innovation Centre's mission is to nurture talent and innovation and to provide its resident entrepreneurs with all the tools, advice and resources they need to achieve, succeed and thrive. The Centre first opened in 2006 as a single storey building, has now expanded into a three floor Centre, complete with 46 studios and offices for businesses in the design, digital and creative sector.

Portfolio Innovation Centre, based at The University of Northampton's Avenue Campus.



AYLESBURY WATERSIDE THEATRE

Aylesbury Waterside Theatre delivers a programme of diverse live entertainment and its opening has marked the start of the town's regeneration. The theatre has attracted international interest in the world of construction and architecture as a landmark building. Boasting a dynamic and diverse programme of live performances, visitors can enjoy world-class entertainment including electrifying West End productions, unparalleled comedy, stunning dance and the best children's shows.



CULTURE

ROYAL & DERNGATE

Royal & Derngate is the main venue for arts and entertainment in Northamptonshire. Their vision is to be a national, regional and local centre for creativity and entertainment which inspires audiences and artists in Northamptonshire through live performance, film and creative projects. Royal & Derngate Theatres was formed in October 1999 to manage The Royal Theatre and the Derngate as one combined organisation.



THE HIGGINS BEDFORD

The transformed art gallery and museum reopened in June 2013 following a £5.8m redevelopment. This brought together three previous cultural venues: Cecil Higgins Art Gallery, Bedford Museum and Bedford Gallery.



The venue showcases wonderful and varied collections including the Cecil Higgins Collection of fine and decorative arts, with its world-class watercolour and print collections. Unique galleries feature the work of William Burges and Edward Bawden. Elsewhere highlights include works by Turner, Constable, Cotman and Blake, whilst the print collection includes works by Picasso, Goya, Munch and Bonnard alongside many others. New displays and exhibition space will explore the inspiring stories of local people and encourage a 'sense of place' for Bedford and the surrounding area.

CORBY CUBE

Corby Cube is a major building development in the town of Corby which opened in November 2010 and cost £47.5m. The building houses a council chamber for Corby Borough Council, a Registry Office, a public library, a 450-seat theatre and a 100-seat studio theatre.



The theatre has a programme of live productions, dance, music and stand-up comedy, complemented by a participation programme encouraging involvement of the whole Corby community. The theatre also screens films twice a week, including current mainstream and independent releases.

HERITAGE

ALTHORP HOUSE

Althorp House was built in 1508 for and by the Spencer Family. It has remained in the family for the past 500 years- the family line has contained politicians, courtiers, admirals, society beauties and pioneers in charity work, as well as gamblers, book lovers and even a breeder of prize bulls.

It is visited now by tourists from around the world for its memorial to Lady Diana.



BLETCHLEY PARK

Bletchley Park, in Milton Keynes, Buckinghamshire, was the central site of the United Kingdom's Government Code and Cypher School (GC&CS), which during the Second World War regularly penetrated the secret communications of the Axis Powers – most importantly the German Enigma and Lorenz ciphers. The official historian of World War II British Intelligence has written that the "Ultra" intelligence produced at Bletchley shortened the war by two to four years, and that without it the outcome of the war would have been uncertain.

The Park has just completed its first phase of £8m restoration, which included a £4.9 million Heritage Lottery Fund (HLF) grant, to create a world-class museum.



SHUTTLEWORTH COLLECTION

The Shuttleworth Collection shows the history of flight ranging from the early 1900s up until the 1950s. The Collection shows how the aeroplane first operated in the 1900s, how it was then developed during World War 1, and then used again in World War 2.

The Collection is situated at Shuttleworth Aerodrome which is one of the few traditional all grass aerodromes that is still in regular use. The Collection is displayed in eight hangars. One of these hangars is a workshop hangar which allows visitors a chance to see the restoration and maintenance in progress.



WATERWAYS MUSEUM

The Canal Museum, situated in the village of Stoke Bruerne on the Grand Union Canal, is housed in an old steam powered corn mill and was opened in 1963 by British Waterways (now the Canal & River Trust). It houses stories, films, collections and displays on waterways and is a very popular location for visitors to the flight of locks and the 3 mile long Blisworth Tunnel.



MK:DONS

Milton Keynes Dons Football Club is an English football club based since 2007 at Stadium MK, Milton Keynes. The result of Wimbledon F.C.'s relocation to Milton Keynes from south London in 2003, it considers itself to have been founded in 2004, when it registered its present name. The team is playing in Football League One, the third tier in the English football league system, during the 2013–14 season.



NATIONAL BADMINTON CENTRE

The National Badminton Centre is based in Milton Keynes and opened in January 2000. The Centre is used for training for world class performance and squads. There are plans to move the Centre to a £20m headquarters and training base at The National Bowl in Milton Keynes. Initial plans include a 16-court badminton hall, a 3,000-seater arena, and a fitness club and athlete accommodation. It is due to open in spring 2015.



STOKE MANDEVILLE STADIUM

Stoke Mandeville Stadium is a fully accessible leisure stadium that is known as the 'home of wheelchair sport' and the 'birthplace of the Paralympic Games movement'.



In April 2003, the Stoke Mandeville Stadium was opened by HRH the Prince of Wales, Royal Patron of WheelPower following a £10.2 million redevelopment which saw the facilities transformed to include new sports and catering facilities.

NORTHAMPTON SAINTS RUGBY GROUND

Northampton Saints are a professional rugby union club from Northampton. They were formed in 1880 and play in black, green, and gold colours at their home Franklin's Gardens.



The club won their first major trophy when they defeated Munster in the 1999–2000 Heineken Cup final.

LUTON INSPIRE SWIMMING POOL

Luton Pool is part of Luton Sports Village and is a full sized Olympic swimming pool and full height and depth diving pool, as well as a community pool and sports equipment. People come from around the area to train and the Village is also a visitor / tourist attraction.



BEDFORD INTERNATIONAL ATHLETICS STADIUM

Bedford International Athletic Stadium is regarded as one of the finest facilities of its kind nationally. Providing a first class facility, it hosts many major National and Regional meetings each year attracting some of the top athletes in the country, including Jessica Ennis-Hill and Mo Farah.



The Stadium offers both indoor and outdoor athletic sporting opportunities, including an international standard eight lane floodlit mondo track, athletics field events area, an American football pitch, eight badminton courts, a court for team sports such as football and a 60 metre sprint track.

MK MARATHON

MK Marathon brings participants from across the regions together for a mass participation marathon event, the first of its kind in the region. The event has been delivered for 3 years, with a total of over 9000 people and 200 corporate teams taking part. Volunteer support and enhanced skills have played a key role in delivering the event.



VISITOR ECONOMY

WHIPSNAD ZOO

Whipsnade Zoo, formerly known as Whipsnade Wild Animal Park, is a zoo and safari park located at Whipsnade, near Dunstable in Bedfordshire, England. It is one of two zoos (the other being ZSL London Zoo in Regent's Park, London) that are owned by the Zoological Society of London (ZSL), a charity devoted to the worldwide conservation of animals and their habitats.



XSCAPE

Xscape in Milton Keynes is host to the country's biggest indoor real snow slope and an indoor Body Flight, along with many other sports and leisure activities that you can get involved in.



WREST PARK

This is one of the most magnificent gardens in England, yet one of the least well known. Unlike 'Capability' Brown's natural landscape styling, favoured during the late 18th Century, Wrest Park's formal gardens provide a fascinating history of gardening styles, laid out over 150 years and inspired by the great gardens of Versailles in France.



Wrest Park was the home of the De Grey family from the 13th Century until 1917. The gardens are celebrated for their rare survival of a formal early 18th Century layout of wooded walks and canals, centred on the architectural highlight of the pavilion designed by Thomas Archer in 1709-11.

MARSTON VALE FOREST CENTRE

The Marston Vale Trust is an independent charity. It is responsible for leading the creation of the Forest of Marston Vale, one of 12 Community Forests across England, designated in the 1990s to regenerate land around towns and cities scarred by industrialisation. The Forest of Marston Vale is being created to address the effects of the brick making industry which had flourished for over a hundred years.



With over 1 million trees planted and numerous woodlands created, the Forest of Marston Vale is already taking shape, with woodland cover trebled from 3% to around 10%. The target is to get to 30% by planting over 5 million more trees by 2031.

BICESTER VILLAGE

Bicester Village is a world famous shopping destination with over 130 boutiques showcasing the world's leading fashion and lifestyle brands.



Bicester Village is now established as a tourist attraction, as well as being the United Kingdom's leading designer outlet village. There are over 5 million visitors each year and it is estimated that around half of those come from abroad to the Village are from China. It has been estimated that Chinese tourists made a total of 825,000 transactions at the outlet site in 2011.

CENTER PARCS WOBURN

Center Parcs Woburn Forest opened in June 2014 and is home to 625 lodges, a 75-bedroom hotel, Center Parcs' largest Subtropical Swimming Paradise in the UK and a state-of-the-art Aqua Sana spa with six luxury Spa Suites.



The Village will also offer a wide variety of indoor and outdoor activities. There are also a wide range of shops and restaurants.

Center Parcs Woburn Forest has created 1,500 jobs for people in the surrounding areas of Bedfordshire including Milton Keynes; 92% cent of employees have come from within 15 miles of the site and many of those are between the ages of 16 and 24. It is estimated that Center Parcs Woburn will inject a significant boost to the area, approximately £20m per year into the South East Midlands economy.

THE NATIONAL BOWL, MILTON KEYNES

The National Bowl is an open-air venue consisting of a grass amphitheatre which is crescent shaped and gently slope down to a large flat area in front of the stage allowing excellent viewing of the performance from all parts of the arena.



It has played host to a number of international musicians including the Foo Fighters and Robbie Williams.

WOBURN SAFARI PARK

Woburn Safari Park is an award winning safari park located in Woburn, Bedfordshire, England. Visitors to the park can drive through the large animal exhibits, which contain species such as white rhino, elephants, tigers and black bears. It is part of the estates of the Duke of Bedford that also include Woburn Abbey and its 3,000-acre (1,200 ha) deer park. The Park first opened in 1970, established by the 13th Duke of Bedford on the grounds of his estate, Woburn Abbey, as a means to help improve the financial position of the estate and restore the Abbey. The park had a £4m upgrade in 2010 to improve off-show animal facilities in the park.



STOCKWOOD DISCOVERY CENTRE

Stockwood Discovery Centre, formerly known as Stockwood Craft Museum, displays collections of: Local Social History, Archaeology, Geology and Rural Crafts. It also houses the biggest horse-drawn carriages collection in Europe, the Mossman Collection. Re-development work in 2007 included the building of the Sensory Garden, World Garden and Medicinal Garden. It is one of the few places in the country where the work of acclaimed artist Ian Hamilton Finlay can be seen on permanent display.



A sample of Case Studies of wider economic benefits of events in the SEMLEP area.

The following case studies are intended to provide some examples of the way in which an event can have a wide ranging impact on the economy of the area. They also provide examples of how the sectors work together to deliver growth, for example, arts and heritage supporting the creative sector and sports supporting the visitor economy.

Case Study 1

STOKE MANDEVILLE BIRTHPLACE OF THE PARALYMPIC MOVEMENT

The London 2012 Paralympic Games put Stoke Mandeville, Aylesbury in the spotlight by showcasing it as a world leader in disability sports, assisted-living and telehealth technologies to enable people to live independently. Working in partnership with the National Spinal Injuries Centre (NSIC) at Stoke Mandeville Hospital and UKTI, Aylesbury Vale District Council facilitated the delivery of two major events in September 2012 showcasing Stoke Mandeville's offer in delivering patient care utilising the latest advances in healthcare technology and an international Telehealth "Meet the Buyers" event, bringing together international purchasers and suppliers of telehealth products and services. Great Britain Wheelchair Basketball ladies team captain Clare Strange led a conference themed around "liberating the individual to live independently" which included Bucks New University showcasing the recently established Centre for Telehealth and Assisted Living (CETAL).

A major outcome has been increased inward investment activity leading to visits by companies looking to collaborate with the NSIC. The Buckinghamshire Legacy Board have helped ensure that this international spotlight remains firmly on Stoke Mandeville, by persuading the International Paralympic Committee that the historic venue should play a permanent role in the torch relay celebrations ahead of all future winter and summer Paralympic Games. The first edition of this ceremony, and the first ever international leg of a Paralympic Torch relay took place ahead of the Sochi Winter Games in 2014, with the Stoke Mandeville Stadium celebrations featuring in the opening ceremony in front of 70,000 spectators and a global TV audience of over 1 billion.

Case Study 2

MILTON KEYNES SUMMER OF CULTURE 2012

The aim of the Summer of Culture was to promote 'world class MK' through a range of cultural programmes under one banner to connect events and increase public engagement. Through 'distinctive arts and heritage' Summer of Culture demonstrated the intrinsic social and economic impacts of its cultural offer. A number of events took place during the Summer of Culture including Milton Keynes International Festival, Dance Festival, Islamic Arts and Cultural Festival and Olympic Torch Relay. This resulted in a number of economic benefits:

- £4.7m direct contribution to the local economy.
- 675 new posts and creative opportunities created for Summer of Culture events.
- £1.6m spent by event organisers on goods and services.



Case Study 3

LOVE LUTON FESTIVAL

As part of the Cultural Olympiad, Luton Borough Council chose to celebrate its participation in the Olympic Torch Relay with a weekend celebration entitled Love Luton Festival. This festival included four distinct components plus other smaller events around the town centre, 6-9 July 2012.

The Festival attracted 74,051 attendances (equivalent to 37,026 individuals). It is estimated that the event generated offsite expenditure within the borough of £1.66m and a total audience expenditure of £2.57m

It also provided an opportunity for people to develop their skills with 150 volunteers who provided over 1,200 hours of service associated with the festival, 25 of whom also gained a Level 2 NVQ certificate in Spectator Safety.



Case Study 4

HEINEKEN CUP QUARTER AND SEMI FINALS

Stadium:MK was selected to host both the Heineken Quarter and Semi Finals on behalf of Northampton Saints when their ground was deemed to not meet the required standards for an event of this size.

The Saints commissioned an Economic Impact Study from University of Northampton to establish lost income to the town. The key findings were:

- The survey reinforces the positive benefit a major match can have on a local economy.
- 3,500 travelling Ulster supporters spent an average of £250 per person.
- 38% of this spend went on food and drink, with 23% going on accommodation/hotels. 6% went on other shopping activities.
- 60% of travelling supporters stayed for one to two nights in Milton Keynes hotels. 12% stayed for three-four nights.
- There were strong satisfaction indicators about the friendliness of locals and the welcome received; the local area as a whole; the standard of accommodation and food and drink; and whether those surveyed would think positively about visiting the area again.

The value from the visiting Ulster team is estimated at just under £900k.



Case Study 5

FORMULA 1 AT SILVERSTONE

A study was undertaken in 2008 to improve the understanding of the impact of the British Grand Prix on Northamptonshire and the surrounding area in the light of the possibility of the location moving to Donington Park.

The conclusions were that the British Grand Prix generated:

- Total expenditure of £54m directly attributable to the event of which around 94% was spent within a 60 mile impact zone.
- Employment of 1,358 FTE jobs of which 497 were in a 60 mile impact zone.
- Income of £20.4m of which £7m directly benefited the 60 mile impact zone.

In addition to these direct impacts the Grand Prix encourages the Formula 1 teams to cluster around Silverstone which in turn leads to the cluster of high performance engineering businesses known as Motorsport Valley and the associated vehicle testing facilities. These collectively make a significant contribution to the economy of the area.

Silverstone is also an all year round visitor attraction with a full racing calendar, driving experiences and a visitor centre. It has also developed a Technology Park and an Innovation Centre, which attract businesses involved in high performance engineering.

Case Study 6

MK FIFA WORLD CUP BID

In 2009 Milton Keynes submitted a bid as one of the 11 cities selected to host matches for the FIFA World Cup 2018 as part of England 2018 World Cup bid. It was estimated that this would bring a total of £152.3m contribution to the Milton Keynes economy attracting over 1 million visitors to the area.



Case Study 7

BEDFORD AND MILTON KEYNES WATERWAY – A FUTURE PROJECT

Bedford and Milton Keynes Waterway which includes Central Bedfordshire is a significant local, regional and national new environmental infrastructure project providing the 26km missing link between the main UK canal network and the Fenland waterways, linking the Grand Union Canal at Milton Keynes to the River Great Ouse at Bedford.

If funding can be found for its construction, it is expected to deliver a wide range of economic, social and environmental benefits to the surrounding area. This includes creating between 2,900 and 3,400 jobs a year in construction and 500 to 900 additional jobs in businesses and other organisations with an additional £35-70m annual Gross Value Added (GVA). When completed, it is estimated to attract around almost 1 million annual trips generating between £16.6m and £26.5m GVA per year.

Case Study 8

THE WOMEN'S CYCLING TOUR

The first ever Women's Cycling Tour came to the East of England in early May 2014 with Stage 2 starting in Hinckley and finishing in Bedford Borough. Organised by SweetSpot, who staged the 2012 Olympic road race, the Women's Cycling Tour was the first international stage race for elite women cyclists and the first to offer equal prize money with their male counterparts.

The aims of Bedford Borough's involvement with the Tour were to; inspire Bedford Borough's residents to get into sport, particularly cycling thereby encouraging healthier lifestyles; to position Bedford Borough on the national and international stage, via the TV coverage, as a beautiful Victorian town and, via an association with an international level sports event, as an exciting town to visit; and, to drive footfall to Bedford's town centre.





Case Study

9

BEDFORD RIVER FESTIVAL

The River Festival is the largest event in Bedfordshire and has a regional and national draw. It helps to define a positive image and profile for the borough in so far as it showcases all that is best about the town. In these terms, the River Festival contributes to creating a “Prosperous Borough” and an “Enjoyable Borough”. It plays an important role in achieving the Council’s ambition for the town centre and is a major part of the Borough’s events programme.

The River Festival continues to be a significant success story for Bedford, with the 2012 festival attracting over 320,000 people, both residents of the town and visitors to Bedford Borough and the Embankment. The economic impact of the River Festival on Bedford Borough is important. Not only does it put Bedford on the map far more effectively than using normal advertising routes, but many local businesses benefit financially from the enormous influx of visitors. Approximately 450 traders from across Bedfordshire and the UK attended the 2012 festival, including local crafts, food and produce and more than 30 local companies, groups and businesses sponsored the event collectively, contributing in cash and in kind over £50,000.

Case Study

10

STOWE LANDSCAPE GARDENS

Stowe, which has been described as England’s first Garden Attraction, has in recent years been restored to its former glory through a £9m investment in the grounds and visitor facilities from the National Trust. The restoration, which is the Trust’s single largest investment in any property in England, has transformed the gardens and buildings to recapture the same views and thrills that 18th Century visitors would have enjoyed and is expected to see a record increase in visitor numbers.



05

Conclusion and Next Steps

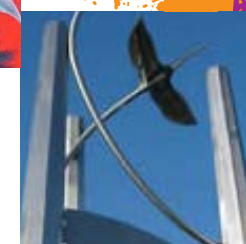
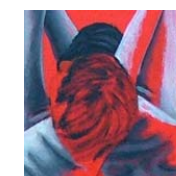
This high level Strategic Plan document has provided a snapshot of the diversity of the AHSVEC&C sectors and their impact on the economy of the South East Midlands.

This evidence provides a baseline against which future growth can be measured.

The next steps, which will be progressed through the SEMLEP Cultural and Creative Industries Group and the Sport and Leisure Sub-group, will be to take the Objectives as set out in Section 2 and develop them into an Action Plan with quantified targets and actions. This will involve, among other things:

- Identifying gaps in the evidence base and areas that would benefit from further research and analysis.
- Identifying specific opportunities for collaborative working that will help to exploit the opportunities and overcome the challenges faced by the AHSVEC&C sectors.
- Working with the sectors to identify a pipeline of future projects that could be candidates for funding from national and international organisations, such as the Arts Council England, Sport England, Heritage Lottery Fund and the European Union.
- Identifying opportunities to support the growth of the businesses in the sector and attract future inward investment such as that at Silverstone and tourism through Paralympics events and Rugby 2015 World Cup.

If you or your organisation would like to be part of this exciting venture to take forward the Strategic Plan then please contact info@semlep.com and explain how you would like to engage.



Glossary of Standard Industrial Code Classifications

Arts, Heritage, Sport, Visitor Economy, Cultural & Creative (AHSVEC&C) Industries

1: ADVERTISING AND MARKETING

This covers the creation of advertising campaigns and placement of such advertising in periodicals, newspapers, radio and television, or other media as well as the design of display structures and sites and media representation.

2: ARCHITECTURE

This includes architectural consulting activities, town and city planning and landscape architecture.

3: CRAFTS

This includes the manufacture of jewellery and imitation jewellery articles. There are substantial difficulties in adequately representing the Crafts sector due to the weaknesses in the underlying classifications that official data are based on. The Department for Culture, Media and Sports is working closely with the Crafts Council, who have commissioned further research to address the problem.

4: DESIGN: PRODUCT, GRAPHIC AND FASHION DESIGN

This includes fashion design related to clothing, apparel, shoes, jewellery, furniture and other interior decoration and other fashion; industrial design, graphic design and interior design.

5: FILM, TV, VIDEO, RADIO AND PHOTOGRAPHY

This includes production of theatrical and non-theatrical motion pictures, projection in theatres, cinemas or for broadcasting on television; supporting activities, distribution of motion pictures and other film productions and projection. This also includes the activities of creating a complete television channel programme, radio broadcasting studios and facilities for the transmission of aural programming.

6: DIGITAL

This includes computer programming and computer consultancy activities in particular the development, production, supply and documentation of ready-made interactive leisure and entertainment software. It also includes the planning and designing of computer systems which integrate computer hardware, software and communication technologies.

7: PUBLISHING

This includes activities of publishing books, newspapers, magazines and other periodicals, directories and mailing lists, and other works such as photos, engravings, postcards, timetables, forms, posters and reproductions of works of art. This also includes translation and interpretation activities and electronic versions such as online or tablet.

8: MUSEUMS, GALLERIES AND LIBRARIES

This includes the activities of libraries and archives; the operation of museums of all kinds, botanical and zoological gardens; the operation of historical sites; nature reserves activities. It also includes the preservation and exhibition of objects, sites and natural wonders of historical, cultural or educational interest (e.g. world heritage sites, etc.)

9: MUSIC, PERFORMING AND VISUAL ARTS

This includes activities in the creative and performing arts and related activities. This includes operation of arts facilities.

10: SPORTS

This includes the operation of sports facilities, activities of sport clubs, fitness facilities and other sports activities.

11: ACCOMMODATION

This includes hotels and similar accommodation, holiday and other short stay accommodation, camping grounds, recreational vehicle parks and trailer parks and other accommodation.

12: FOOD AND DRINK

This includes restaurants, cafes, mobile food services, public houses, event catering and the operation of food concessions, such as at sports or similar facilities.

13: AMUSEMENT AND RECREATION ACTIVITIES

This includes a wide range of units that operate facilities or provide services to meet the recreational needs of a broad range of customers. It includes the operation of a variety of attractions, such as mechanical rides, water rides, games, shows, theme exhibits and picnic grounds.

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SEMLEP

South East Midlands
Local Enterprise Partnership