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REGENERIS

Economic and Social Impact Assessment of The Southbank Centre

A Final Report by Hatch
August 2020

Southbank Centre

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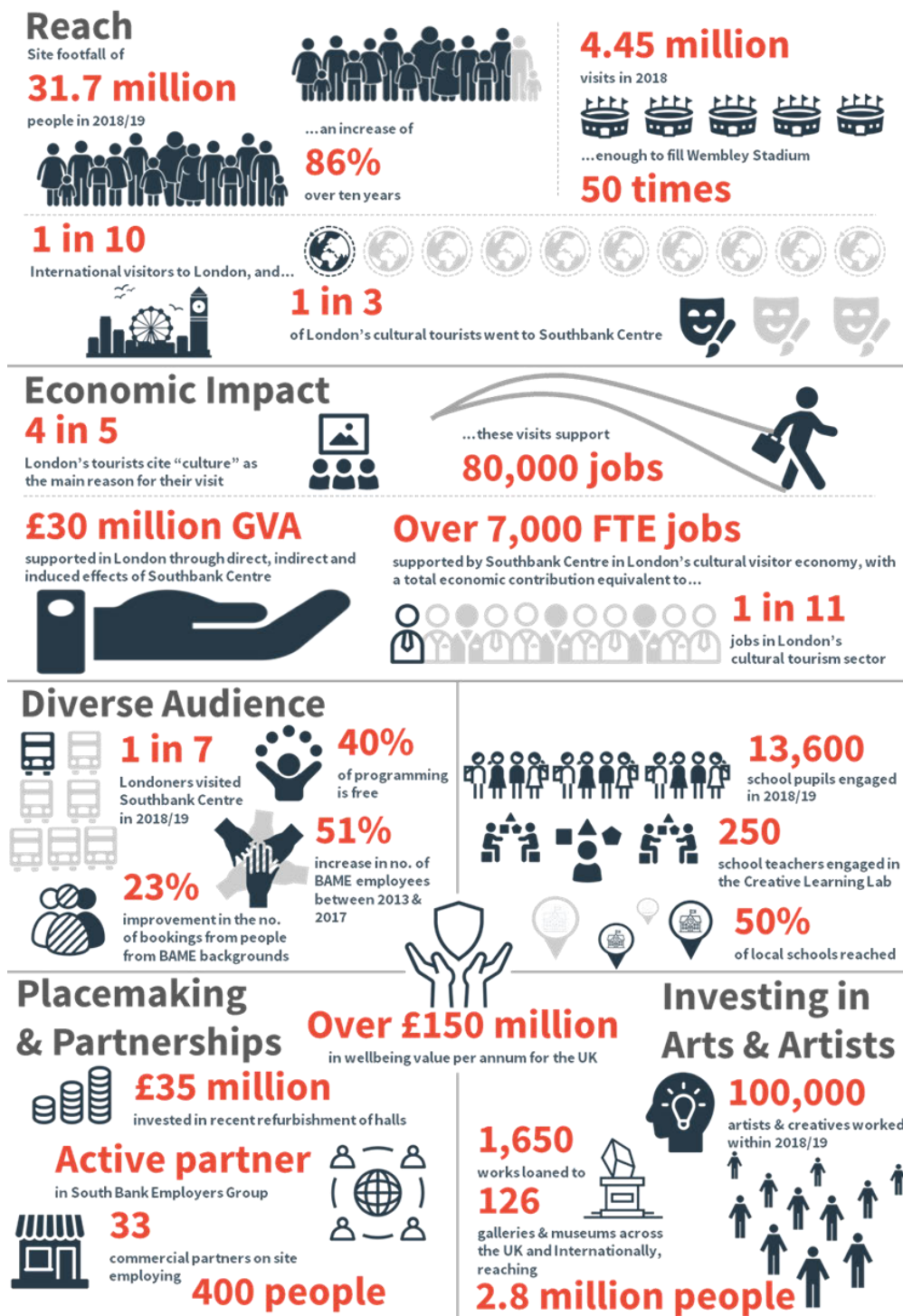
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Executive Summary

- i. Hatch Regeneris has been appointed to assess the economic and social contribution of the Southbank Centre at a local and national level. The assessment covers the wide range of ways through which the institution delivers wider economic and social value.
- ii. The infographic below sets out a selection of key facts and figures from the report. We then provide a summary of these points under each impact theme.



The Southbank Centre's Reach

iii. **The Southbank Centre has a wide reach geographically and amongst various audience groups**, both as a visitor destination and through its growing digital programme.

- With 4.45 million visits in 2018, The Southbank Centre was the fifth most visited attraction in the whole of the UK: it received more visits than the Tower of London and Royal Albert Hall combined, and its visitors could fill Wembley stadium 50 times.
- 1 in every 33 UK residents attended the Southbank Centre in 2018/19, with visitors from all regions of the UK.
- Approximately 1 in every 7 Londoners visited the Southbank Centre in 2018/19. 1 in 6 visitors to booked events came from the local boroughs of Lambeth and Southwark.
- There is a growing body of evidence on wellbeing effects from engaging with the arts: we estimate that given its local reach, the Southbank Centre supports over £150 million in wellbeing value per annum for the UK
- Drawing 45% of its visits from overseas, the Southbank Centre is an important cultural tourism asset. Around 1 in 10 of all London's international visitors went to the Southbank Centre, along with 1 in 3 cultural tourists.
- The Southbank Centre has significant digital reach: the website received 9 million visits in 2018/19, a 29% uplift on the previous year. 44% of visits were from other UK regions, and 16% were from overseas. Instagram engagement grew by 52%.

The Southbank Centre's Economic Contribution

iv. **The Southbank Centre has a significant economic footprint in London and across the UK** through its role as an employer, purchaser, and as a visitor attraction.

- Southbank supports 456 direct Full Time Equivalent (FTE) jobs across a range of front of house, administration, technical and curatorial/artistic roles. A further 50-100 jobs are supported within pop-up and other enterprises based on-site.
- Southbank spent £25m with 900 suppliers across the UK, with £15m spent with suppliers based in London, especially in the security, construction and the creative sectors.
- The core economic contribution of Southbank (ie direct, indirect and induced effects) is estimated at 970 FTE jobs and £30 million in Gross Value Added in London, growing to around 1,200 FTE jobs and £42 million in GVA across the UK.
- The spend of visitors off site supports significant economic activity in London and beyond. This is estimated at 7,400 net additional FTE jobs and £530m of GVA in

London. For the UK, this additional expenditure supported 6,000 net additional FTE jobs and £440m in GVA.¹

- For every direct job at the Southbank Centre, a further 2-2.5 are created in the regional and national economy, and 1 in every 11 jobs in London's cultural tourism sector is supported by Southbank.
- Southbank delivers a series of supply side economic impacts through its work with artists, pop-ups, and wider economic impacts from visitors. It plays an important role in the development of the arts and cultural sector, helping to promote enterprise, and pulling in visitors for the benefit of other nearby attractions.

Creativity through Diversity

- v. **The Southbank Centre is committed to widening access to the arts for its audiences, local communities, and wider stakeholder groups.** It currently delivers:

- At least 40% free programming each year.
- Strong recent performance in the past year on increased tickets held by over 65s (up 96%), BAME (up 23%), and new local audiences (up 15%). 24% of Southbank's visits were made by BAME people in 2018/19, particularly high when compared to 15% across other London Association of Leading Visitor Attractions (ALVA) members.
- Diversity and Inclusion (D&I) workplace programmes, resulting in a 51% increase in BAME employees between 2013 and 2017.

Creative learning for all

- vi. **The Southbank Centre delivers a creative learning programme for schools, young people and adults, as well as arts sector professionals,** providing creative learning pathways to inspire long term interest in the arts and culture sector. It delivers:

- Strong engagement with primary, secondary and SEN schools, reaching 13,600 students in 2018/19. This included a c. 50% penetration rate in local primary schools, including through Arts Explorers, a three-year programme with 6 Lambeth primary schools.
- Engagement with school teachers, 250 of whom were engaged in the same year through programmes like the Creative Learning Lab, generating £515,000 of social value as a result.
- Partnership working through formal education partnerships, like the South Bank Partners group across British Film Institute (BFI), National Theatre and Rambert creative learning teams, and other local partners like the Lambeth and Southwark Music Services.

¹ Note the UK figures on visitor economy impacts are lower here as they only take into account expenditure by visitors from overseas. Spend by UK residents is treated as displacement at the UK level.

- Programmes for young adults and adults. The adults programme delivers a series of evening and weekend courses for all adults, and professional development activities targeting art sector professionals as well as other adults. 2018/19 saw noteworthy growth across both groups, at 210% and 179% respectively, delivering over £2 million of social value that year.
- Ongoing involvement in a bespoke Masters level course, in collaboration with Kings College London, with an annual cohort of 26 students.

Creative health and wellbeing

vii. **The Southbank Centre is committed to demonstrating the important role of arts and culture in improving public health and wellbeing**, and increasingly is acting as a sector leader and convener in this area. It delivers impact through:

- A community level programme of creative health activities including (B)old, a highly successful festival for older people that attracted 6,000 attendees in 2017 and which has led to a variety of ongoing projects. Southbank has created a new role to coordinate this area going forwards.
- Dedicated analysis of audience and visitor wellbeing, including HeARTs, a new partnership with the Royal College of Music to monitor this longitudinally. ALVA data from 2018/19 shows Southbank achieved a 2-6% uplift in wellbeing scores compared with all other London destinations.
- A strategic focus on proving, demonstrating and advocating the power of the arts to reduce social isolation and loneliness, and to influence UK policy across the health and arts sectors. Southbank held the first Creative Health Conference in 2019 with 700 attendees, and this year has been announced as the host for the National Academy of Social Prescribing in partnership with NHS England and other key players.

Placemaking and Partnerships

viii. **The Southbank Centre has played a pivotal role in the long-term regeneration of the South Bank** since the 1950s, is a key member of the Cultural Quarter, and works with a range of local partners to invest in its continued development. The Southbank Centre:

- sits at the heart of the Cultural Quarter, along with the National Theatre and BFI
- is an active partner in South Bank Employers Group and a range of other forums and community groups promoting long term investment in the local area.
- invested £35m in major refurbishment of the Queen Elizabeth Hall, Hayward Gallery and Purcell Room, which were reopened in 2018.
- plays a critical role in the vibrancy of the area, with a total footfall on the site of 31.8 million in 2018/19, an 86% increase over 10 years
- has a public festivals programme which attracted an audience of 42,800 in 2018/19, delivering £235,000 of social value.

- has 64 commercial partners on site including traders, pop-up enterprise, and retail, food and beverage outlets. Collectively these employ an estimated 400 people.
- has supported Long Live Southbank, a grass roots organisation set up to maintain and enhance the South Bank skate park. A joint crowdfunding campaign was run for the space, which gained support from the international skateboarding community, general public, businesses and philanthropists.

Investing in Art and Artists

ix. **The Southbank Centre generates a series of positive spillover benefits for the wider cultural and creative industries ecosystem**, through its work with artists, support of other institutions, and its wider lobbying and policy influencing work:

- The Southbank Centre worked with over 100,000 artists and creatives in 2018/19.
- Its talent development work stretches from professional diversity programmes to community and youth groups in residence. For example, in 2018/19, five women conductors were supported through the Women's Conducting Masterclass, delivering an estimated £10,000 of social value.
- The Southbank Centre manages the Arts Council Collection of loaned art works, and in 2018/19, over 1,650 works were shown in 126 different galleries and museums across the UK and internationally, reaching an audience of over 2.8 million people.
- The Hayward Gallery Touring programme held exhibitions at 80 other institutions across the UK in 2018/19.
- Southbank created a cross-organisation mentoring scheme in 2017, and last year had 80 participants from the Barbican, National Theatre, Royal Opera House, as well as Southbank.

1. Purpose of the report

- 1.1 The Southbank Centre is the UK's largest arts centre, operating on a global stage as well as playing an important role in the local, regional and national UK economy. It is one of the UK's top five visitor attractions, occupying a prominent riverside location that sits in the midst of London's most vibrant cultural quarter on the South Bank of the Thames.
- 1.2 The Southbank Centre has commissioned this report to assess its economic and social contribution to London and the UK and, whilst not a formal cost-benefit assessment, it demonstrates the public value for money and the return on investment that the Southbank Centre delivers through various channels.

Our approach to the assessment

Measuring economic and social value

- 1.3 The methodology for assessing economic and social value draws on the frameworks used by the Arts Council and DCMS, and is directly informed by a discussion with the Arts Council's Economist to ensure consistency and robustness in the measurement approach.
- 1.4 As a part of the wider £145 billion² cultural and creative industries in the UK, the Southbank Centre generates a measurable contribution to the national economy in terms of GDP/GVA³ and jobs supported. This includes the value of the direct activities within its venues and the wider spillover effects on supply chains and the visitor economy.
- 1.5 At the same time, the Centre's activities generate both economic and social value in other ways, including by supporting other parts of the creative industries, developing creative skills, engaging communities in the arts, educating children and adults and helping to drive local regeneration. Some of these effects can be valued in monetary terms – for example, through effects on subjective wellbeing. The report provides a valuation of these effects where feasible, whilst telling the story on these contributions, providing case studies, key facts and figures, and putting the contributions into their wider socio-economic context.
- 1.6 The assessment is informed by:
 - a data collection exercise, drawing on data held by the Southbank Centre as well as publicly available data
 - a thorough review of key activities and programmes within each thematic area of the report, drawing on available monitoring data, evaluation surveys, visitor feedback, and available case studies collated by the Southbank Centre
 - consultations with internal stakeholders within the Southbank Centre
 - targeted consultations with wider stakeholders including partners and policymakers
- 1.7 The report uses 2018/19 as the base year for the assessment, drawing on complete data for the year as well as avoiding discontinuities caused by the COVID-19 pandemic, which took hold in March 2020 and led to the temporary closure of the venues due to the national lockdown.

² DCMS Sectors Economic Estimates 2018

³ GVA is the key measure of the value of economic activity at the level of an organisation, sector or region.

- 1.8 As well as focussing on the local socio-economic contribution to London, the assessment picks up on the Southbank Centre's national reach and wider spillover effects for the rest of the UK, for example through supply chain linkages, networks, and audiences.
- 1.9 Methodological details are provided in the Technical Appendix.

Coverage of the report

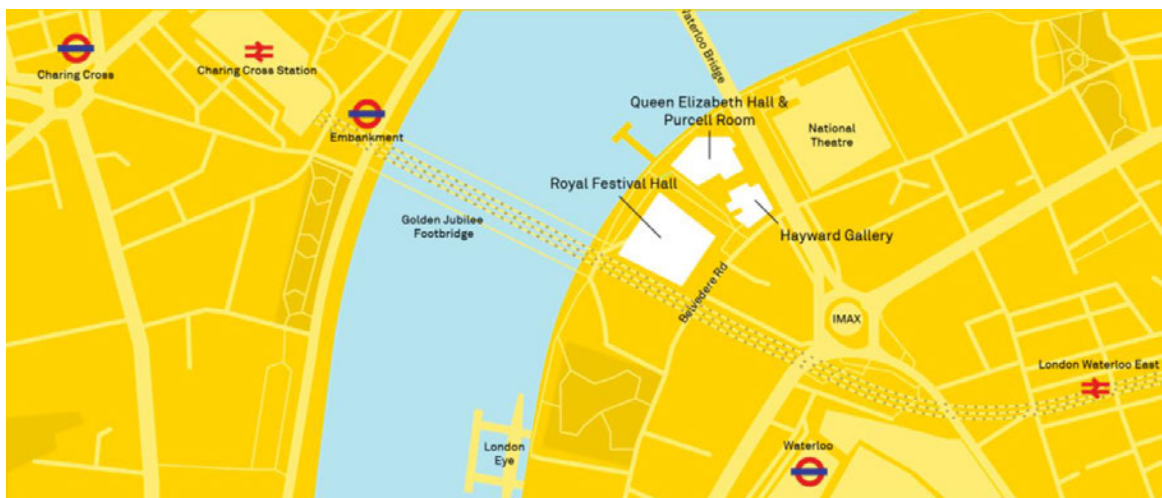
- 1.10 The report is split into sections, each of which explores a different aspect of the Southbank Centre's economic and social contribution:
- **Chapter 2 – Thriving central London arts centre:** an introductory chapter to introduce the Southbank Centre, and the context in which it is operating.
 - **Chapter 3 – Visitation and societal reach:** this chapter examines the Southbank Centre's reach in terms of audiences at its venues and online, including their geographic and demographic characteristics.
 - **Chapter 4 – Economic impact:** the contribution made to the local and national economy as an employer and purchaser of local goods and services, and spillovers on the visitor economy
 - **Chapter 5 – Creativity through diversity:** the work carried out by the centre to promote wider access to arts and culture, both for a series of priority groups and across its wider audiences.
 - **Chapter 6 – Creative learning for all:** the work carried out by the centre to improve individuals' and communities' access to creative learning, skills and other opportunities in relation to arts and culture.
 - **Chapter 7 – Creative health and wellbeing:** the work carried out by the centre to engage with its local communities and promote positive benefits for a range of audience groups and those most in need.
 - **Chapter 8 – Placemaking and partnerships:** the work carried out by the centre to build and maintain a unique sense of place as part of the Southbank Cultural Quarter, and offer a hub which is open to all for a wide range of events and activities.
 - **Chapter 9 – Investing in arts and artists:** the work carried out by the centre to support and promote the continual development of artists and the arts in general, in an inclusive manner and which capitalises on its soft power to achieve global impact.

2. A Thriving Central London Arts Centre

Overview of the Southbank Centre

- 2.1 The Southbank Centre was created in 1951 when the Royal Festival Hall was built to celebrate the Festival of Britain, a national exhibition and fair placed in the bombed-out South Bank of the Thames to lift the spirits of post-War Britain. Today the area is thriving with arts and cultural activities, as home to the National Theatre, the British Film Institute and its IMAX cinema, Jubilee Gardens and the London Eye.

Figure 2-1: Map of the Southbank Centre buildings and location



Source: Southbank Centre website

- 2.2 The Southbank Centre is formed of four main venues:

- **Royal Festival Hall** – the first and biggest Southbank Centre venue including a 2,700-capacity auditorium, the Southbank Centre Shop, Riverside Terrace Cafe, Central Bar and Skylon restaurant, as well as the:
 - Clore Ballroom – a dancehall hosting public events and classes
 - Southbank Centre Archives – offers access to collections that contributed to the 20th century's finest art, architecture and performances for special interest or research purposes
 - National Poetry Library – the most comprehensive collection of poetry in Britain with over 200,000 items, free membership and a free accessible postal service for people with sight difficulties
- **Hayward Gallery** – a world-renowned contemporary art gallery, presenting a wide range of adventurous and influential artists from around the world
- **Queen Elizabeth Hall** – a leading London venue showcasing world-class talks, gigs, dance, performance and classical music. Includes a 900-capacity auditorium and a foyer which hosts live music
- **Purcell Room** – an intimate, 295 seat venue set within Queen Elizabeth Hall and hosting music and performance, screenings, poetry readings and a variety of talks and debates

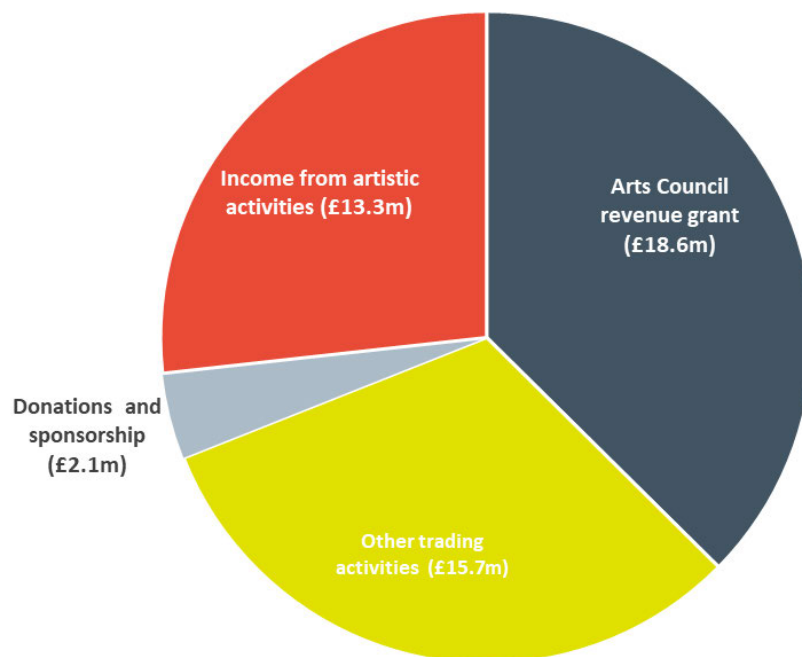
Figure 2-2: Queen Elizabeth Hall (left) and Royal Festival Hall (right)



Source: Southbank Centre website

- 2.3 The Southbank Centre is principally funded by Arts Council England, with an £18.6 million grant in 2018/19, representing around 37% of its income – see below.

Figure 2-3: Breakdown of Southbank Centre Funding



Source: Southbank Centre Annual Report

Strategic context for the report

Recognising the role of the arts and cultural sector in the UK

- 2.4 The UK's cultural and creative industries are a very significant part of the British economy. The creative and cultural sector contributes around £144bn in Gross Value Added (GVA),

over 7% of the economy⁴. As a result, the sector has a significant influence on economic and social prosperity and is widely acknowledged as a strategic opportunity to improve health and wellbeing, education and skills development, employability and wider life opportunities, as well as to enrich our sense of place, identity and community.

- 2.5 The fastest growing cluster of cultural and creative activities in the UK is found in London: using DCMS's definition of the sector, the capital generates more than 39% of GVA in the creative industries.⁵ Four out of five tourists to London cite "culture" as the major reason for their visit, and these visits support 80,000 jobs and £3.2 billion in GVA in the capital.

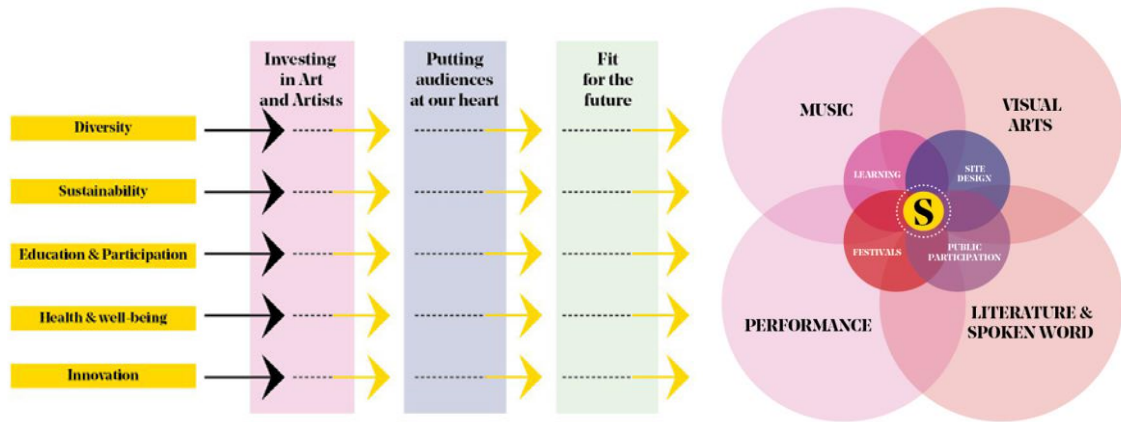
The Southbank Centre as a cornerstone of UK arts and culture

- 2.6 The Southbank Centre plays an important role in supporting and encouraging continued innovation and artistic excellence, as well as best practice in societal impact and outreach. The centre's strategic approach is founded on ambitious and inclusive values and it seeks to deliver high quality programmes and products for its visitors and audiences, and to find ways to innovate to attract and draw in new and diverse visitors.
- 2.7 This is achieved through a combination of thoughtful programming, the considered selection of artists, a broad events offer, and established community outreach work. As part of this outreach work, Southbank has developed a variety of innovative activities and participation opportunities to promote learning and health and wellbeing benefits, adding value to its cultural arts function.
- 2.8 The Southbank Centre's strategic approach is reflected in a 'Pillars and Petals' framework, as shown in Figure 2-4 below:
- the pillars represent the Southbank Centre's **institutional values**
 - **Investing in Art and Artists** – Southbank's innovative programme blend ensures the variety of its offer, whilst its nurturing of new artists and emerging talent opens up opportunities for careers in the arts to new groups.
 - **Putting audiences at its heart** – the creative learning offer demonstrates the value of arts and cultural engagement at a young age and throughout life, whilst considerable outreach work engages a diverse set of audiences geographically and demographically.
 - **Fit for the future** – as the largest arts centre in the UK, the Southbank Centre delivers world class spaces, combined with a strong digital engagement offer, with 75% of its programme available online and a growing digital engagement amongst its audiences.
 - the petals represent **art forms and the programmes they contribute to**, including the Southbank Centre's four core forms - visual art, music, literature and performance, as well as cross-disciplinary opportunities, supported through its learning programme, site design, festivals and public participation programming.

⁴ DCMS Sectors Economic Estimates for 2018, released 2020

⁵ DCMS Sectors Economic Estimates for 2017, released 2019

Figure 2-4: The Southbank Centre's strategic 'Pillars and Petals'



Source: Board Presentation Slides

- 2.9 The Southbank Centre's strategic approach, as expressed through its 'pillars and petals' framework, is closely aligned with ACE's 2030 Vision, which states:

"By 2030 we want England to be a country in which the creativity of each of us is valued and given the chance to flourish, and where every one of us has access to a remarkable range of high-quality cultural experiences."

- 2.10 The commitment of the Southbank Centre to promote diversity, inclusion, quality, and learning across its artists, audiences and communities is borne out in the wide range of evidence collated in the later sections of this report. At its core is a commitment to providing excellent public value for money, monitoring and evaluating its own socioeconomic performance, and thereby securing cultural and creative opportunity of its future audiences and artists for years to come.

3. Visitation and Societal Reach

Key messages

The Southbank Centre has a **wide reach geographically and amongst various audience groups**, both as a visitor destination and through its growing digital programme.

- The Southbank Centre received 4.45 million visits in 2018, making it the fifth most visited attraction in the whole of the UK: it received more visits than the Tower of London and Royal Albert Hall combined, and its visitors could fill Wembley stadium 50 times.
- The Southbank Centre's presence serves to animate the wider area by supporting pop up enterprises, public art installations and other activities. Wider footfall on the site reached 31.7 million in the same year, a growth of 86% since 2008.
- 55% of visitors came from the UK: around 1.8 million unique visitors. This implies that 1 in every 33 UK residents attended the Southbank Centre in 2018/19, with visitors from all regions of the UK.
- The Southbank Centre is an important local asset. Approximately 1.2 million unique visitors came from London, equivalent to 1 in every 7 Londoners. 1 in 6 visitors to booked events came from the local boroughs of Lambeth and Southwark, equivalent to 8% of residents.
- There is a growing body of evidence on the wellbeing effects of engaging with the arts: we estimate that given its local reach, the Southbank Centre supports over £150 million in wellbeing value per annum for the UK
- Drawing 45% of its visits from overseas residents (1.5m unique visitors in 2018), the Southbank Centre is an important cultural tourism asset. Around 1 in 10 of all London's international visitors went to Southbank Centre, along with 1 in 3 cultural tourists.
- The Southbank Centre attracts a slightly younger visitor population than other London ALVA destinations: the average age of visitors aged over 16 is 37 years old compared to 40 years old for other London ALVA venues.
- The Southbank Centre has invested in its digital offer and this is helping it to expand its reach and accessibility significantly, as well as to maintain engagement throughout the period of lockdown in 2020. The website received 9 million visits in 2018/19, a 29% uplift on the previous year. 44% of visits were from other UK regions, and 16% were from overseas.
- There have also been significant increases in its social media presence, with Twitter, Facebook and Instagram engagement growing by 4%, 12% and 52% respectively in the past year.

Growing audience

- 3.1 The Southbank Centre is one of the UK's principal arts and cultural institutions, operating on a world stage, as well as reaching out to audiences locally, nationally and internationally.

- 3.2 In 2018, the Southbank Centre received 4.45 million visits⁶ to both ticketed and free events, making it the fifth most visited attraction in the whole of the UK. To put this into context:

- This was roughly equal to the annual number of visitors to the Tower of London and the Royal Albert Hall combined
- Annual visits to the Southbank Centre could fill Wembley stadium roughly 50 times.

- 3.3 The total footfall on site is far higher, estimated at 31.7 million in 2018, **having increased 86% since 2008**. This includes visitors to its food stalls, engaging with the public art, or just passing through the space.

- 3.4 In terms of chargeable events ticketed by the Southbank Centre, recorded over 1 million ticket sales to its venues were recorded in 2018, representing a 13% increase over 10 years. This is more than every overnight visit made to the City of Birmingham in the same year⁷.

- 3.5 The Southbank Centre also hosts many free events and externally ticketed events, such as external conferences and graduation ceremonies. There are approximately 3.45m visitors to free or externally ticketed events.

- 3.6 Breaking down ticket bookings across artforms, the highest proportion of tickets are booked for classical series (331,000), followed by festivals (241,000), visual art (232,600), performance (160,400) and gigs (148,400), as shown below by Figure 3-1. Literature, talks and topics and dance art forms received a much lower proportion of ticketed attendance (49,800, 23,500 and 9,400 tickets booked respectively).

Table 3.1 Top 5 ALVA members in terms of 2018/19 visits

Rank	Site	Total visits (m)
1	Tate Modern	5.9
2	British Museum	5.8
3	National Gallery	5.7
4	Natural History Museum	5.2
5	The Southbank Centre	4.5

Source: ALVA 2018/19

“The Southbank Centre is like a second home to me; the place I have been privileged to witness and enjoy, with friends and family, a wide and wonderful array of diverse performers and artists”

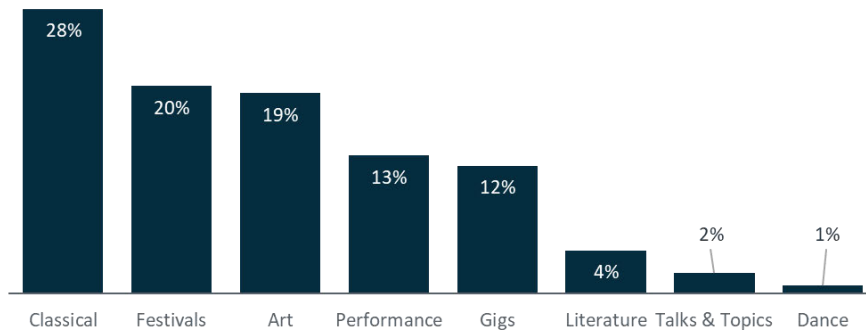
~Visitor feedback

- 3.7 On average across the ticketed, external and free events, events received a rating of 9.2 out of 10 from visitors. Audiences left feeling ‘Entertained’ (58%), ‘Happy’ (51%), ‘Intellectually Stimulated’ (51%) and ‘Emotionally moved’ (50%), and 97% of visitors said they would probably or definitely come back to the Southbank Centre following their visit.

⁶ ALVA 2018/19 data, <https://www.alva.org.uk/details.cfm?p=609> (NB this is based on visits to Hayward Gallery, Queen Elizabeth Hall and Purcell Room only)

⁷ ONS Travel Trends, 2018

Figure 3-1: Ticketed attendance by artform, 2018/19



Source: Annual attendance by month - Artform_Festival_Series

- 3.8 As part of a wider visitor feedback programme in 2017/18⁸, the Southbank Centre asked audiences to share their most memorable experiences to better understand how audiences engage with the Southbank Centre and the lifetime value of arts and cultural experiences. Many explained how they have visited for many years and introduced children and grandchildren to the arts as a result. The feedback demonstrated a consistent association with the Southbank Centre and significant family and other social experiences mentioned suggest a deeper connection with the venue for many visitors than simply facilitating an event they wish to see.

“Coming here as a child and then bringing my own child to all the Funharmonics concerts of the last 7 or 8 years - like home from home for us!”

~Visitor feedback

Reach by geography

Local audiences

- 3.9 The Southbank Centre is firmly embedded in its local population. The majority of visitors surveyed as part of the 2018/19 ALVA survey⁹ were from the UK (55%). Drawing on the total numbers of 4.5m visitors, the survey sample suggests that in 2018/19 proportionately **1.8m visits were from UK residents**. It can be conservatively estimated that **around 1 in every 33 people in the UK visited the Southbank Centre in 2018/19**¹⁰.
- 3.10 Within the UK, most visitors surveyed in 2018/19 were from within the South East and London (87% of UK visitors) of which two thirds were from within London¹¹. This suggests **1.2m visitors were from London**, meaning that **around 1 in every 7 Londoners visited**

⁸ ACE Survey Submission, 2017/18

⁹ ALVA Survey Report, 2018/19

¹⁰ This uses UK Population Estimates, 2018 (UK and region of London), and assumes that 70% of visits were unique visitors in that year (see later data on repeat visits)

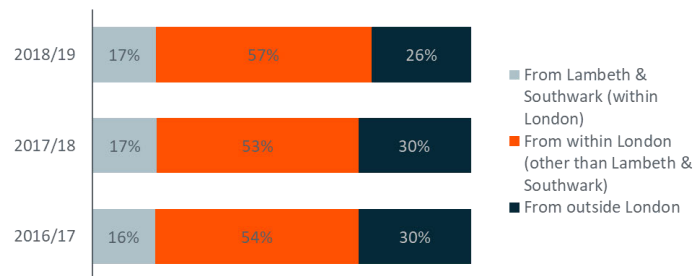
¹¹ London is defined as visitors from the London postcode area.

the Southbank Centre in 2018/19¹² which, for a sense of scale, is over 25% more visitors than the number of international visitors to Wales in the same year.

- 3.11 Comparing ALVA survey findings across ALVA members suggests that a slightly lower proportion of visitors to the Southbank Centre report themselves to be living in its local area compared with findings from other London ALVA members¹³. The Southbank Centre is seeking to support its local visitation figures through its free programme and other concessionary options, with 1,350 free events and 17,000 tickets issued with concessions in the preceding year, 2017/18. The work of the Southbank Centre to benefit its local community is discussed in more detail in Section 5 of this report.
- 3.12 That said, looking at bookings data only, more than **1 in 6 visitors were from the Southbank Centre's local boroughs of Lambeth and Southwark (742,000 visitors)**. This is equivalent to roughly 8% of Lambeth and Southwark's population¹⁴. As Figure 3-2 shows, the proportion of visitor bookings from Lambeth and Southwark has remained fairly steady in recent years, with an increase in bookings from within London in 2018/19.

“It’s difficult to underscore the importance of the Southbank Centre to the Borough of Lambeth. One of the things that they do really successfully is the work they do with our local communities. They try as hard as they can to bring in those people from the borough who wouldn’t necessarily enjoy and take advantage of that local offer.” – London Borough of Lambeth

Figure 3-2: Breakdown of ticket bookings by local geography, 2016/17 to 2018/19



Source: Southbank Centre marketing KPIs data

¹² UK Population Estimates, 2018 (UK and region of London)

¹³ ALVA Survey 2018/19

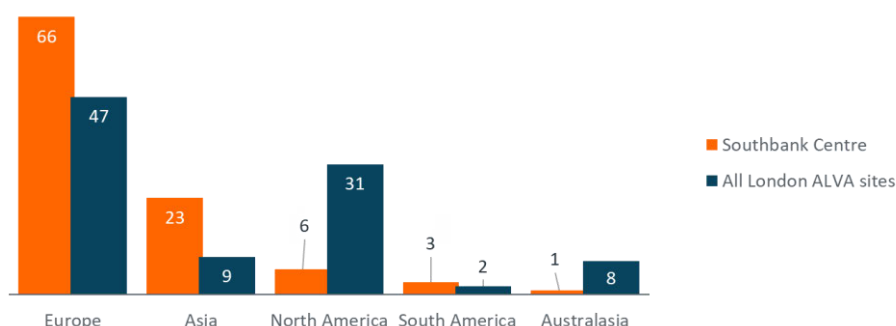
¹⁴ GLA Assembly Constituency Profiles 2016; ONS, London and UK population 2016

There is an established body of evidence that suggests that attending and engaging in arts and cultural events and activities has a benefit to individual wellbeing. Expert research commissioned by DCMS¹⁵, shows that arts and cultural engagement is associated with higher wellbeing, valued at £90 per person per month. Applying this wellbeing value to the number of adult UK visits to Southbank Centre in 2018 equates to a **wellbeing value of over £150m per annum**.¹⁶

International reach

- 3.13 In 2018/19, **45% of visitors surveyed were from overseas**. This implies there were roughly 1.5m overseas visitors to the Southbank Centre in 2018/19. Over this period, London received 19m international visitors in total,¹⁷ and of these an estimated 6.1m¹⁸ visited London for its cultural offer. This suggests that around **one in ten of London's international visits** and **one in three of London's international visits for culture** was to the Southbank Centre. The Southbank Centre also compares favourably with other ALVA members in London in terms of attracting overseas visitors, with 45% of visitors being international compared with 42% at other London destinations, as surveyed in 2018/19.
- 3.14 The Southbank Centre has a distinctive mix of international visitors when compared with other London ALVA member organisations, as shown by Figure 3-3. Visitors from Europe and Asia make up 90% of surveyed international visitors compared to 56% at other London ALVA member organisations. Also, 7% of the Southbank Centre's international visitors surveyed were from Australasia and North America, compared to 39% of international visitors surveyed at other London ALVA member organisations.

Figure 3-3: Proportion of international visitors by top 5 regions, %, 2018/19



Source: ALVA Survey, 2018/19

- 3.15 The visitor survey also finds that Southbank Centre visitors who had visited more than once in the year tend to visit more frequently than repeat visitors at other London ALVA sites. On average repeat visitors reported to have been to the Southbank Centre seven times

¹⁵https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/304899/Quantifyin_g_and_valuing_the_wellbeing_impacts_of_sport_and_culture.pdf

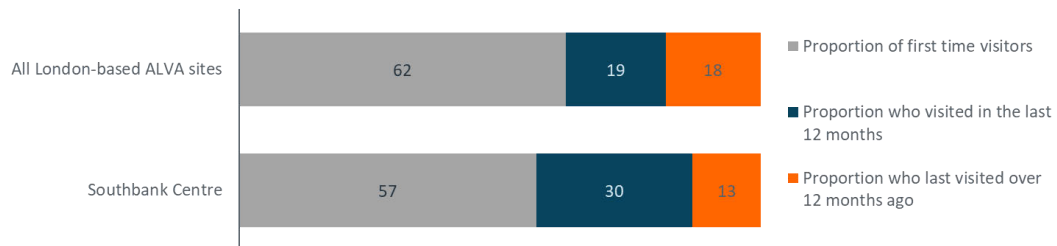
¹⁶ Figure updated to 2018/19 prices, and deadweight applied to control for regular local visitors.

¹⁷ ONS, Overseas Residents Visits to the UK, 2014-2018

¹⁸ According to the ONS Overseas Residents Visits to the UK figures, 9.5m of London's visitors in 2018 visited for the purpose of a holiday. The GLA study into the value of Cultural Tourism in London estimates 64% of London's holiday visitors to attribute the purpose of their visit to culture.

over the past year, compared to just five visits over the past year at other London ALVA sites. This suggests visitors return at least every two months at Southbank, rather than every three months at other attractions.

Figure 3-4: Breakdown of first time and returning visitors, 2018/19



Source: ALVA Survey, 2018/19

- 3.16 The Southbank Centre attracts a slightly younger visitor population than other London ALVA destinations, with the average age of visitors aged over 16 being 37 years old, three years younger than the average age across other London ALVA destinations.
- 3.17 The Southbank Centre booking figures provide further insights into its reach across different age groups.¹⁹ As shown by Figure 3-5, the organisation receives a varied mix of visitor bookings which largely reflect the national profile of engagement of adults with the arts²⁰.
- 3.18 People aged over 65 account for 23% of the Southbank Centre's visitor bookings, compared to 18% of the UK population.²¹ This is especially important given the Taking Part Survey²² which found that nationally people aged over 75 are less likely to have engaged with the arts over the past year than any other adult age group.²³
- 3.19 Under 16s are slightly underrepresented in the Southbank Centre ticket bookings compared to the UK average, but this is assumed to be a result of their often attending in school groups, where ticket bookings would not be required. Nationally, under 16s are found to be very well engaged with the arts with 96% having engaged at least once over the past year²⁴.

¹⁹ Please note however this records the details of people making bookings only, and so may miss information on diverse groups or visitors who do not attend events ticketed by Southbank Centre

²⁰ Taking Part Survey, adults 16+, 2018/19: Arts

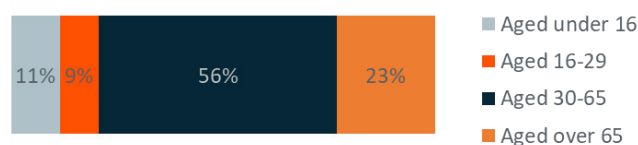
²¹ ONS, Overview of the UK Population, <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/articles/overviewoftheukpopulation/august2019>

²² Taking Part Survey, adults 16+, 2018/19: Arts

²³ According to the Taking Part Survey, only 64% of people surveyed in this age group reported to have engaged over the year compared to at least 77% of 16 to 64 year old people.

²⁴ Taking Part Survey, children (5-15), 2018/19

Figure 3-5: Breakdown of ticket bookings by visitor age, 2018/19



Source: Annual Demographics - Weekly_Festival_Artforms_Series Combined, 2018/19

Digital audience

- 3.20 Digital development continues to be a strategic area of growth for the Southbank Centre, and ambitions to expand audience reach and engagement have been supported through the recruitment of an internal content team in 2017/18 to deliver an expanded editorial offer. The newly launched website in 2016 has also provided enhanced functionality, and this has proved a critical investment in the wake of the COVID-19 crisis, as well as wider trends in demand for virtual arts and cultural content.
- 3.21 As a result of this investment, the Southbank Centre's website received over 9 million visits in 2018/19, representing a 29% uplift in visits on the previous year²⁵. Of the new website users, 84% were from within the UK. Significantly, 44% were from outside London. The remaining 16% were from overseas, with 5% from the US²⁶. People in New York made up a higher proportion of visits to Southbank's website than visitors from Birmingham and Manchester combined, demonstrating its international cultural importance.
- 3.22 The Southbank Centre achieved strong growth in social media engagement across all three of its platforms between 2017/18 and 2018/19. Twitter, Facebook and Instagram grew by 4%, 12% and 52% respectively, as shown by Figure 3.6 and 3.7. Since refining its video offering, Southbank now uses Facebook as the primary delivery platform as opposed to YouTube. This led to over a million views of its videos in 2017/18 with two of the biggest successes coming via Facebook Live partnerships.
- 3.23 The Southbank Centre has also established a dedicated audio content strand through its iTunes channel with a programme of curated recordings from its literature and talks programmes delivering over 20,000 listens to a UK and global audience.
- 3.24 Digital outreach is important to the Southbank Centre's ability to reach potential new visitors. According to the 2018/19 ALVA report, 67% of visits to the Southbank Centre were prompted online, either by online advertising or visits to the website or social media platforms. Given that most of the Southbank Centre artwork collection is also available online (51-75%), this further highlights the accessibility and wide reach of the Southbank Centre's digital offer.²⁷

²⁵ KPI spreadsheets

²⁶ Top Countries Apr 18- Mar19

²⁷ ACE Survey 2018/19

Figure 3-6: Social media engagement by platform

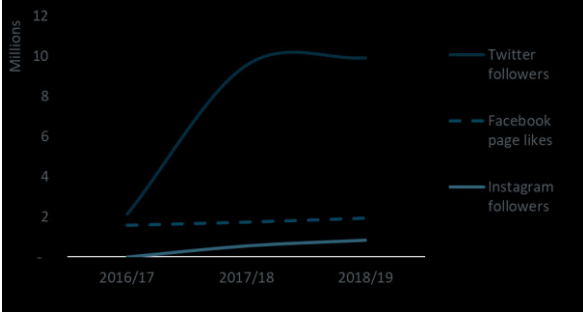
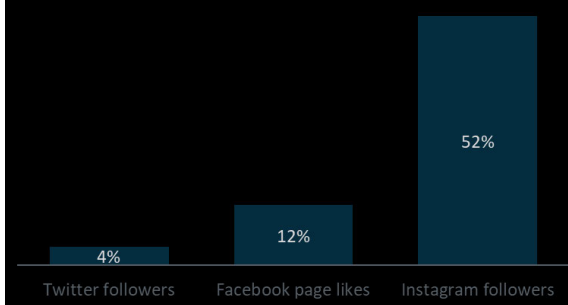


Figure 3-7: Growth in social media engagement pa by platform, 2017/18-18/19



Source: Southbank Centre data

4. Economic Impact

Key messages

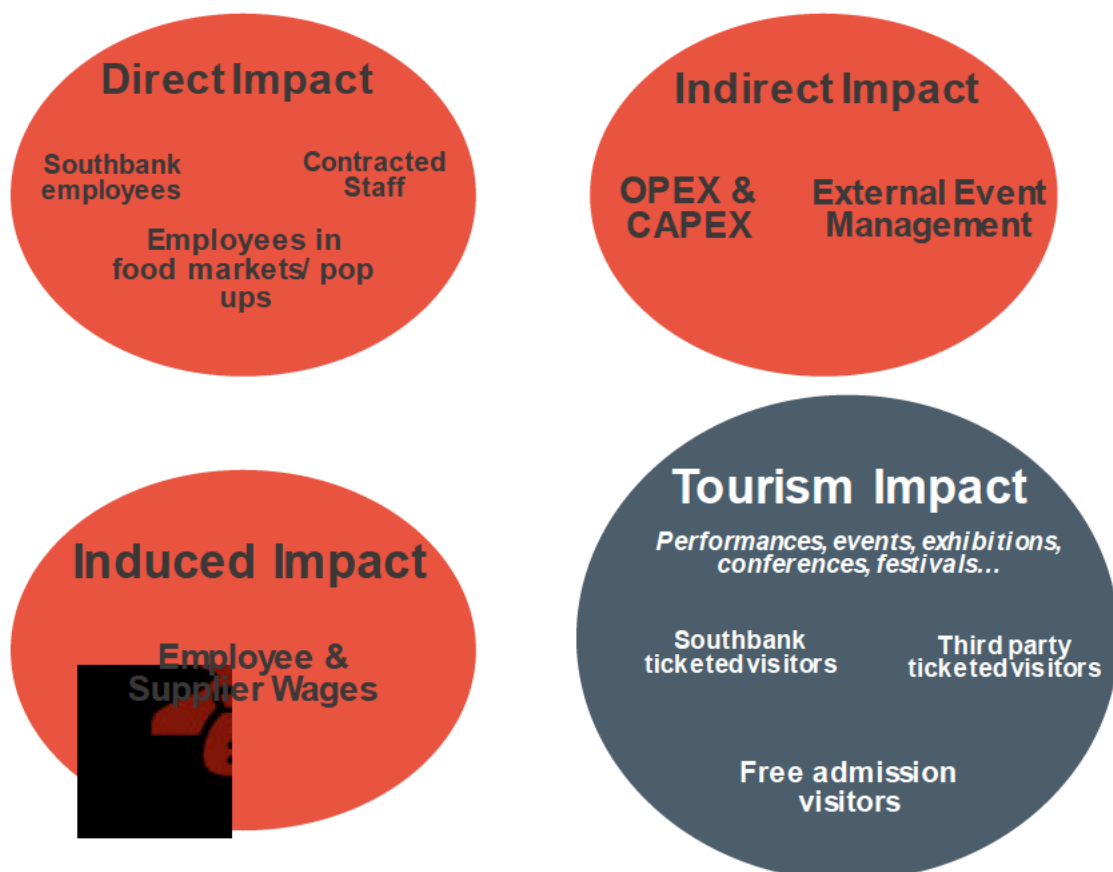
The Southbank Centre has a **significant economic footprint in London and across the UK** through its role as an employer, purchaser, and as a visitor attraction.

- The Southbank Centre supports 456 direct FTE jobs across a range of front of house, administration, technical and curatorial/artistic roles. A further 50-100 jobs are supported within pop-up and other enterprises based on-site. It is estimated that the direct GVA of Southbank is £26.7 million.
- The Southbank Centre spent £25m with 900 suppliers across the UK, with £15m spent with suppliers based in London, especially in the security, construction and the creative sectors.
- The wages of the Southbank Centre's employees and those in the supply chain also supports economic impact as they are spent with business in London and across the UK. 90% of employees live in London and 10% in Lambeth.
- The core economic contribution of the Southbank Centre (ie direct, indirect and induced effects) is estimated at 970 FTE jobs and £30 million in GVA in London, growing to around 1,200 FTE jobs and £42 million in GVA across the UK.
- Around 4.5m visitors visited the Southbank Centre in 2018/19. These visitors were drawn from far and wide, with around 45% from overseas and around 20% from the rest of the UK
- The spend of these visitors off site, estimated at £480m per annum in London based businesses, supports significant economic activity in London and beyond. This is estimated at a net additional 7,400 FTE jobs and £530m of GVA in London. For the UK, this additional expenditure supported 6,000 net additional FTE jobs and £440m in GVA.²⁸
- This implies that, for every direct job at the Southbank Centre, a further 2-2.5 are created in the regional and national economy, and that 1 in every 11 jobs in London's cultural tourism sector is supported by the Southbank Centre.
- The Southbank Centre delivers a series of supply side economic impacts through its work with artists, pop-us, and wider economic impacts from visitors. It plays an important role in the development of the arts and cultural sector, helping to promote enterprise, and pulling in visitors for the benefit of other nearby attractions.

²⁸ Note the UK figures on visitor economy impacts are lower here as they only take into account expenditure by visitors from overseas. Spend by UK residents is treated as displacement at the UK level.

- 4.1 The Southbank Centre has a significant economic footprint in London and across the UK. As Figure 4.1 illustrates, there are multiple layers to this economic footprint, taking in the Southbank Centre's role as an employer, purchaser of goods and services, and as a visitor attraction. This section quantifies these demand-side impacts on the economy, covering direct, indirect and induced effects (so called *core-economic effects*), as well as visitor economy impacts.

Figure 4.1 Coverage of The Southbank Centre's Economic Impact



Demand side

Direct effects

- 4.2 In 2018/19, the Southbank Centre directly employed almost 600 permanent and temporary staff, equivalent to around **456 Full Time Equivalent (FTE) jobs**. These were across a range of roles such as front of house, administration, technical occupations as well as curatorial and artistic jobs to support exhibitions and the functioning of the centre.
- 4.3 The majority of these staff are based locally – 90% are resident in the Greater London area, and 10% are located in Lambeth. This, in turn, means a significant local economic impact from their own spending in the local economy (see induced impacts below).

4.4 The Southbank Centre also contracts out a range of services offered on-site such as the management of restaurants, pop-ups and food markets. These are externally procured and so the associated economic impact from this is covered under the indirect impacts section below.

4.5 However, these all support direct employment on-site. It is estimated that the restaurants on average support around 250 jobs over the course of a year. The pop ups/market stalls support jobs on a seasonal basis as they are not present all year round. It is estimated that a further 50 jobs are supported in a typical summer season (May – September) and a further 100 jobs over a winter season.

4.6 Finally, it should also be noted that by providing a home for them, the Southbank Centre plays an important enabling role in the operations of its four resident orchestras:

- The London Philharmonic Orchestra
- The Philharmonia Orchestra
- The London Sinfonietta
- The Orchestra of the Age of Enlightenment

4.7 As we explain in the Technical Appendix, in order to be conservative we have not included the employment in these orchestras as part of the Southbank Centre's economic footprint, given issues around the attribution of this employment to the Southbank Centre. But it is worth noting that, collectively, the orchestras employ significant numbers of people as musicians and in ancillary roles.

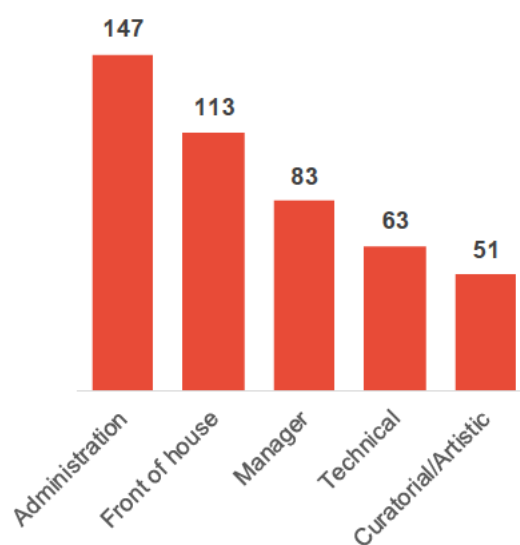
4.8 The direct contribution of Southbank can also be measured in terms of Gross Value Added (GVA). It is estimated that the direct **GVA of Southbank is £26.7 million.**

Indirect/Supply chain effects

4.9 In 2018/19 Southbank spent around £25m with 900 suppliers across the UK. Of this, £15m (or 62%) was spent with suppliers based in London, with around £1.8m spent locally with suppliers based in Lambeth. Across its 3 artistic venues, restaurants, food markets, and seasonal activity such as summer and winter festivals, as outlined above the Southbank's Centre utilises the resource and expertise of external suppliers in order to ensure the successful running of the centre. In addition, whilst most events are run in-house, the Southbank Centre does on occasion externally procure specific aspects of events on an ad-hoc basis, such as for bespoke lighting needs or for catering.

4.10 An overview of the key sectors in London from which the Southbank Centre procures is provided in the table below. This reflects its requirement to maintain, service and secure the venues at the Southbank Centre, to draw in support and expertise to develop exhibitions and performances, as well as carry out administrative services such as legal and accounting.

Figure 4.2 Direct FTE jobs at the Southbank Centre



Source: Southbank Centre

Table 4.1 the Southbank Centre Supplier spend by sector, 2018/19

Sector	Spend (£m)	% of Total Spend
Buildings & Landscape Activities	£3.5	23%
Security & Investigation Activities	£3.2	20%
Creative, Arts & Entertainment Activities	£2.1	14%
Libraries, Archives, Museums & Other Cultural Activities	£1.1	7%
Office Administrative, Office Support & Other Business Support Activities	£0.9	6%
<i>Other Sectors (c.25 sectors)</i>	<i>£4.5m</i>	<i>30%</i>

Source: Southbank Supply Spend data, Hatch Regeneris

- 4.11 This supply chain expenditure supports jobs within its direct suppliers as well as in the wider supply chain, as the Southbank Centre's suppliers themselves spend money on their own suppliers in order to respond to the demands of the Southbank Centre, and so on (this is known as the *multiplier effect*). It is estimated that in **London, this supply chain impact supports £15m in GVA and 350 FTE jobs**. This rises to **£20m in GVA and 500 FTE jobs across the UK**.

Induced effects

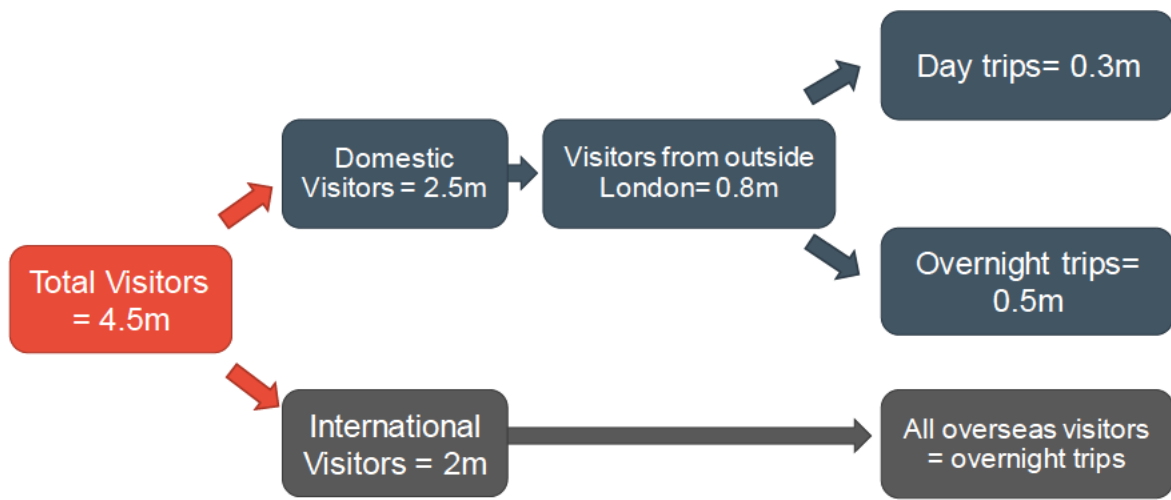
- 4.12 As the Southbank Centre's employees and those in its supply chain spend their wages and salaries, this spending on food and drink, clothing, transport and so on supports further economic activity in London and the UK through multiplier effects. It is estimated that these induced effects support **£15m in GVA and 200 FTE jobs in London, and £20m in GVA and 250 FTE jobs across the UK**.

Tourism effects

- 4.13 As we saw in Section 3, the Southbank Centre attracts large numbers of visits to London: in 2018/19 the Centre itself received over 2.8m visits from outside London, the majority of which were from overseas (around 2m). This does not include casual visitors to the wider South Bank area, captured in the 31.7 million visitor footfall.
- 4.14 It is estimated that around 4.5 million visitors visited the Southbank Centre in 2018/19. This covers 1 million ticketed/ booked visitors for events, conferences and performances that are booked through the Southbank Centre including the Resident Orchestras and other dance and musical performance. The remaining 3.5 million visitors are to other commercial events that are booked externally (eg with an operator who rents the space at the Southbank Centre) and also visitors to over 1,200 free events that are held at the Southbank Centre, such as exhibitions and festivals.²⁹
- 4.15 We have used Southbank Centre survey data to estimate a detailed breakdown of visitors (day vs staying visitors, by origin). This showed that around 55% of visitors were from the UK, and around 66% of these were from London.

²⁹ It should be noted that the Southbank Centre will also bring in additional visits from touring artists, orchestras, entourages and press, all of which will create further economic impacts for London and the UK. These have not been quantified here due to lack of data.

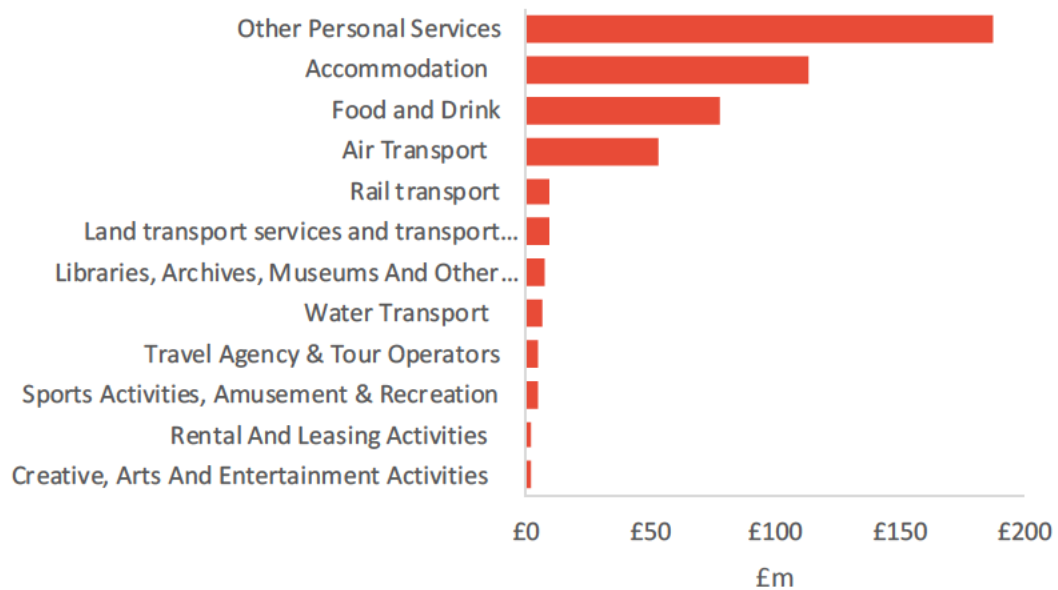
Figure 4.3 Southbank Centre Visitor Breakdown



Source: Southbank, Hatch Regeneris. Note: Visitor Numbers have been rounded

- 4.16 Using benchmark average spend figures for each cohort of the above visitors, we estimate that these visits generated total gross expenditure of approximately £750 million in London (excluding expenditure within the Southbank Centre's venues themselves). This expenditure is strongly driven by the high levels of spend from international visitors (who account for 45% of total visitors but over 80% of this gross spend).
- 4.17 The survey data helps us to understand the proportion of these visits that can be seen as additional: some of the visitors to the Southbank Centre would have been in London already for other purposes (such as if they already live in the area or if they were visiting for another purpose). This indicates that approximately 64% of this expenditure can be attributed to the presence of the Southbank Centre (in other words, 36% would have taken place anyway).
- 4.18 It is therefore estimated that the Southbank Centre brought in around **£480m of additional expenditure to London, of which £400m was additional to the UK**. This is equivalent to around £117 per visitor, and 1 in every £20 of spend by all leisure visitors in London.³⁰ This expenditure benefited a variety of businesses in sectors including hotels, bars and restaurants, shops, and transport companies.

³⁰ Based on data from the International Passenger Survey and Great British Tourism Survey for leisure expenditure in 2018 in London.

Figure 4.4 Additional Expenditure Supported by Southbank Visitors in London by Sector

Source: Hatch Regeneris. Note: Other personal services includes 'special shopping' or 'personal transport' and other activities not included within the tourism industries as defined by the Office for National Statistics.

- 4.19 This expenditure supports significant economic activity within the visitor economy and beyond through multiplier effects. We estimate that this expenditure **supported a net additional 7,400 FTE jobs and £530m of GVA in London**, including supply chain and induced multiplier effects. For the UK, this additional expenditure supported 6,000 net additional FTE jobs and £440m in GVA.³¹

Total Economic Impact

- 4.20 Adding together all the elements shows the significant economic impact the Southbank Centre makes to both the London economy and across the UK. In total, the core economic impact of the Southbank Centre (ie direct, indirect and induced effects) is estimated at 970 FTE jobs and £30.7m in GVA in London, and around 1,200 FTE jobs and £42m in GVA across the UK.
- 4.21 This implies that for every direct job at the Southbank Centre, a further 2-2.5 FTE jobs are created in the wider regional and national economy.
- 4.22 The impact is significantly enhanced when considering the impacts from visitor spend – supporting a further 7,400 FTE jobs across London and 6,000 FTE jobs across the UK. This implies that 1 in every 11 jobs in London's cultural tourism sector is supported by the Southbank Centre³².

³¹ Note: the UK figures are lower than the London figures because only spend by international visitors can be counted as additional to the UK (whereas in London, spend by visitors from the rest of the UK can also be counted as additional).

³² Based on data from GLA Economic on the Value of Cultural tourism in London

Table 4.2 Total Economic Impact Summary

	Direct		Indirect		Induced		Total Core		Off-site Visitor	
	FTE	GVA	FTE	GVA	FTE	GVA	FTE	GVA	FTE	GVA
London	456	£26.7	330	£12.5	190	£17.0	970	£30.7	7,400	£530
UK	456	£26.7	490	£21.3	260	£20.1	1,200	£42.0	6,000	£440

Source: Hatch Regeneris calculations, drawing on Southbank Centre data

Supply side

- 4.23 In addition to the demand side impacts above, Southbank delivers a series of supply side impacts through its work with artists, pop-ups, and wider economic impacts from visitors.
- 4.24 The Southbank Centre plays an important role in **the development of the arts and cultural sector**. It is an important institution for artists and smaller cultural organisations, allowing them to showcase their work, providing network opportunities to raise their profiles, as well as offering training, experience and support. This enabling role contributes towards the development of skills, partnerships, and ideas. The specific work that the Southbank Centre undertakes with artists is outlined in further detail in Chapter 9. It is difficult to quantify the impact of this on the sector, however it is clear that this activity that the Southbank Centre enables helps to grow the arts and cultural sector in London and more widely across the UK.
- 4.25 Further, the **Southbank Centre promotes enterprise** through providing space for pop-up businesses and stalls to operate on-site, throughout the summer and winter seasons and as part of their festivals. In addition to creating jobs (as outlined above), they are a critical component in activating space around the site. In addition to the external restaurants, cafes and shops, there is space for 36 mixed market traders, and a further 11 pop-up businesses hosted on a seasonal basis. Providing space and opportunity for these businesses to trade promotes enterprise in the area, and anecdotal evidence from consultations indicates that they are an important reason for some visitors to visit the South Bank - as not all visitors visit the site for arts and cultural purposes. Chapter 10 elaborates on the impact of the Southbank Centre towards placemaking.
- 4.26 There are also **wider visitor economic impacts**. The Southbank Centre is at the centre of a key cultural hub, adjacent to the British Film Institute, the National Theatre, and the Jubilee Gardens. It therefore plays a critical role in pulling visitors to the local area who go on to visit these other institutions. Southbank Centre visitor survey data shows that over 44% of visitors visited the site as part of another visit. Given that just under half of the Southbank Centre's visitors are from overseas, these visitors represent additional visitors to the area who would likely not have been there without the presence of the Southbank Centre.

5. Creativity through Diversity

Key messages

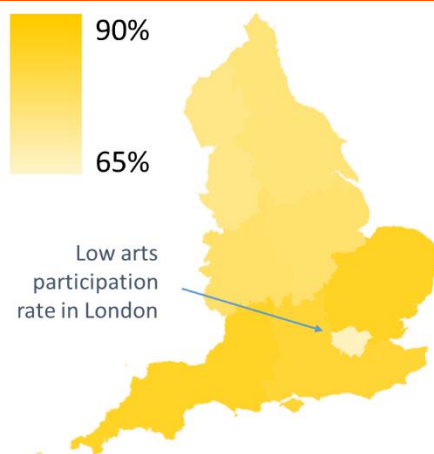
The Southbank Centre is committed to **widening access to the arts for its audiences, local communities, and wider stakeholder groups**. It achieves this through targeted marketing and communication activities, ensuring its artistic programming is diverse and reflective of wider UK society, as well as delivering strategic diversity and inclusion (D&I) programmes for its staff and employees. It delivers:

- Performance-based marketing activity to engage new local, U30s, and BAME audiences, with other strategic priorities around older and LGBTQI+ audiences.
- At least 40% free programming each year.
- Strong increase in tickets held by over 65s (up 96%), BAME audiences (up 23%), and new local audiences (up 15%). 24% of the Southbank Centre's visits were made from BAME backgrounds in 2018/19, particularly high when compared to 15% across other London ALVA members.
- Diverse artistic programming, particularly through an annual festival programme, and use of immersive and interactive performances to encourage local community involvement.
- D&I workplace programmes, resulting in a 51% increase in BAME employees between 2013 and 2017. The Accelerate programme alone delivered £39,000 of social value in 2018/19.

Committing to arts for all

The importance of inclusion and diversity

Figure 5-1: % engagement in the arts by region, 2018/19



Source: Taking Part Survey, England Adult Report, 2018/19

5.1 There are clear issues around diversity and inclusion in access to the arts in the UK, with significant differences in access between different demographic and geographic groups of the population.

5.2 Across English regions, London has the lowest participation in the arts with 67% of people engaging in the arts once or more in the last 12 months, compared with 73-86% of residents engaging in the arts among the other UK regions³³.

5.3 BAME people also tend to participate less in the arts. According to the Taking Part Survey for England 2018/19, less than 70% of those who describe their ethnicity as 'Black' or 'Asian' had engaged with the arts over the previous 12 months, compared with 79% of those of 'White' ethnicity. Disability, too, acts as a significant barrier to engagement with the

³³ Taking Part Survey: England 2018/19

arts if not accounted for by public and arts institution mobility measures. In 2018/19, people with a long-standing illness or disability were 6% less likely to have engaged with the arts over the past year than people without this restriction, according to the same survey.

- 5.4 Inclusion and Relevance is one of the four Investment Pillars in the Arts Council's recently published ten-year strategy, which states that the Arts Council will "...ensure that this country's diversity is fully reflected in the culture it produces":

The Southbank Centre's strategic commitment

- 5.5 Diversity is a strategic priority for the Southbank Centre: it sees its ambition to deliver artistic excellence as being closely tied to the diversity of its artists and audiences, as well as within the institution itself. The Business Plan as part of its National Portfolio Organisation application in 2018 seeks to address arts and culture diversity and inclusion issues by engaging 'the widest possible audiences in the broadest range of cultural forms'³⁴. The plan also seeks to influence the wider sector by establishing 'the norm that diversity in the arts is synonymous with excellence in the arts'. The Southbank Centre recently received a Creative Case for Diversity rating of "Strong" based on a comprehensive assessment from ACE.³⁵

Widening access to the arts

Key initiatives

- 5.6 The institutional commitment to diversity and inclusion is reflected in the Southbank Centre's **marketing strategy** and **wider audience development priorities**. The focus is on reaching out to BAME communities, local Lambeth residents, under 30s, LGBTQI+ communities and limited access audiences.³⁶ In practising this strategy, the Southbank Centre carries out targeted email and social media campaigns, research into booking data to inform artistic programming, and assessment of the appeal of free programming to encourage diverse audiences.
- 5.7 Alongside its commitment to providing **free access to at least 40% of the participation programme**, an example of the Southbank Centre's **targeted free programming** is the under 30's scheme, which offers free introductory tickets and further £10 tickets to visitors who are aged under 30. The Southbank Centre also has a dedicated Community Marketing officer who specifically seeks to target African, Chinese and South Asian audiences as well as making connections with hard to reach groups from the local community. These core target groups form part of every marketing campaign.
- 5.8 The Southbank Centre runs Dementia Friend information sessions for staff, which are included in the inductions of all Visitor Experience staff. This is the official training as created and authorised by the Alzheimer's Society, and all in house trainers are approved to deliver it.
- 5.9 To support these efforts, the Southbank Centre has developed a **data-led approach** to its audience analytics, investing in systems that enable it to build clear and consistent profiles of the existing audience base and allow segmenting by behavioural categories. Further work has mapped current programming provision against the known database in order to establish where Southbank is either over- or under-serving audiences, to look at where

³⁴ Southbank Centre NPO application, 2018

³⁵ [file:///C:/Users/Fann93872/Downloads/ACE DiversityReport Final 03032020 0.pdf](file:///C:/Users/Fann93872/Downloads/ACE%20DiversityReport%20Final%2003032020%200.pdf)

³⁶ Case studies that promote inclusion and diversity at Southbank Centre

cross artform initiatives are most likely to work, and where fundraising effort might be best directed.

Recent performance

- 5.10 Looking across all target groups, the last two financial years have seen the Southbank Centre make good progress in widening access, as shown by Table 5.1. The only target group for which booking numbers have not improved are the under 30s. However, the wider progress made by the Centre is significant given low and negative levels of change in the national picture. According to the Taking Part Survey 2018/19, the proportion of target groups engaging regularly fell across every age group compared to the previous year, except for a 0.1% rise in the proportion of 65-74-year olds engaged. This is also born out in ALVA data for 2018/19, with 24% of visits to the Southbank Centre made by people from BAME backgrounds compared to 15% of visits across all London ALVA members. However, the data also suggests the proportion of Southbank Centre visits from those with limited access is falling below the London average, at 5% of visits compared to 11% across the city.

Table 5.1 Ticket data and ALVA data by group, 2017/18 to 2018/19

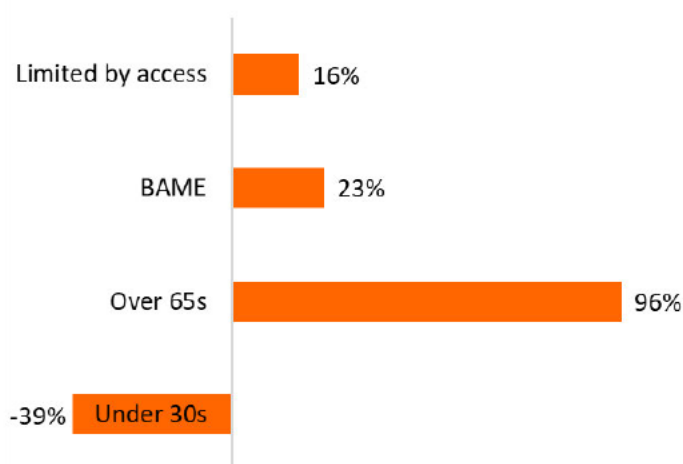
Group	Tickets 2017/18		Tickets 2018/19		% change in tickets 17/18 - 18/19	ALVA 2018/19	
	No.	%	No.	%		% Southbank visits	% all London visits
Under 30s	128,649	17%	78,135	9%	-39%		
Over 65s	100,206	13%	195,930	23%	96%		
BAME	131,039	17%	160,668	19%	23%	24%	15%
Limited by access	57,657	7%	67,142	8%	16%	5%	11%
Total	770,816	100%	845,621	100%	10%		

Source: Southbank Centre Annual Demographics data by ticket; ALVA data

- 5.11 Of particular note are:

- significant increase in bookings by over 65s of 96%. This compares favourably to the national findings of the Taking Part survey which reports just a 0.1% increase in 65-74-year olds engaging with the arts and a 4% fall in participation of over 75-year olds over the same period in England. This is driven in part by the Creative Health programming designed for older people, for example, the monthly tea dances and the (B)old programme (see Chapter 7).

Figure 5.2 % Change in tickets by group, 2017/18 to 2018/19



Source: Southbank Centre Annual Demographics data by ticket.

- **a 23% improvement in the number of bookings from people from BAME backgrounds.** According to 2018/19 ALVA data, 24% of the Southbank Centre visitors are from BAME backgrounds compared to 15% of visitors across all London ALVA destinations. Furthermore, the proportion of BAME attendance at specific festivals is much higher - examples being Africa Utopia where the BAME audience made up 59% of the total, and Alchemy where the BAME audience made up 51%³⁷.
- **progress in attracting new, local audiences.** As shown in Section 3, there was a 15% uplift in bookings from visitors living in Lambeth and Southwark between 2016/17 and 2018/19³⁸. However, the Southbank Centre has proportionately fewer local visitors when compared across London attractions, with 9% of its surveyed visitors living in the area compared with 13% in London according to 2018/19 ALVA data. Targeted offers such as the Encounters programme outlined below will continue to improve the Southbank Centre's offer for local people.

Case Study: Encounters programme

In 2019, the Southbank Centre launched Encounters as part of its commitment to diversifying its classical music audiences. The scheme offers a free classical 'night out' in the company of a leading musician to people who have never previously attended a live classical concert.

The Southbank Centre worked with local community groups, including Streetwise Opera, the Irene Taylor Trust and Coin Street Community Builders, as well as local employers to identify and prioritise places for those least likely to enjoy this kind of opportunity. The scheme is open to ex-offenders, people not in education, employment, or training (NEETs), people who have experienced homelessness, isolated older people and community groups, as well as local workers. The Southbank Centre also developed a digital resource, 'Newcomers guide to Classical Music' promoted online to further promote classical music to new audiences.

"I have never been to an opera/classical evening before so wasn't sure what to expect but I was pleasantly surprised and enjoyed every moment of the show."

~ Encounters programme attendee

Free concert tickets are made available for return visitors bringing other concert newcomers along with them, and this offer is repeated for those visitors in turn.

In total there were approximately 60 participants, all of whom were newcomers to classical music. Musicians taking part included Nicola Benedetti, Chi-Chi Nwanoku, James Gilchrist, Sean Shibe, Roderick Williams, Susan Bickley, John Wilson, Mark Anthony-Turnage and Colin Currie.

³⁷ This is based on 2017/18 festivals data.

³⁸ Southbank Centre Marketing KPI data.

Promoting a diverse artistic programme

Key initiatives

5.12 The Southbank Centre also influences diversity and inclusion through its **artistic programming**. The strategic focus is on representation and relevance for the people of London, and the participation team seeks to ensure all voices are represented in the centre's artistic work and vision.³⁹ This approach includes the production of programmes which celebrate artists from a range of backgrounds across gender, sexuality, ethnicity, age and disability.

“Friendly, warm, vibrant, proud of its heritage and confident in its role bringing exciting and excellent exhibitions and performances to everyone!”

~Audience feedback

5.13 This is most clearly represented through the Southbank Centre's **public festival programme**. The 2019 programme included a series of multi-art form festivals, working with local, national and international partners. The aim was to create a programme of work that represents all voices present in society including those that may typically be pushed to the margins. The festivals included:

- **LGBTQI+ Summer** – two months of events and performances celebrating alternative pride and featuring performances and DJ sets with 12,900 attendees
- **Africa Utopia 2019** – a yearly festival which showcases art and ideas from Africa and the African diaspora, drawing an audience of 3,250 across different events.
- **Meltdown Festival** – an annual music festival held on the Riverside Terrace, curated by a different leading music act or artist each year. In 2019, it pulled in an audience of 2,225 over 2 weeks.

5.14 The Southbank Centre also seeks to create events that directly involve audiences in the performance itself, from **immersive and interactive performances**, to deeper opportunities for learning and engagement, such as Bernstein's Mass.

³⁹ Southbank Centre Public Programming Mission and KPI's

Case study: Bernstein's Mass

A large-scale production of Leonard Bernstein's MASS was designed as a participatory experience for children and young people. It requires vast staging, and provided the opportunity to involve a range of amateur performers from the local community.



The Public Programming team connected with local schools and community groups to find **500 performers**, giving them access to professional tutors. They were involved in two performances in Royal Festival Hall in 2018, with special low-ticket prices for local residents and communities. The event was a sell out and received extremely positive feedback on social media, and from participants and audiences.

Supportive workplace environment

Key initiatives

- 5.15 The Southbank Centre seeks to offer opportunities and support growth and creativity for all as a workplace, as well as for audiences and artists. Its strategic approach to diverse hiring and career progression is set out in a **Workforce Equality Action Plan**. The objectives are to reach targeted increases in vacancies filled, staff retained and management representation of BAME and disabled staff, while raising the number of women in production and technical roles (see case study below). It has also:
- developed the “Southbank Centre Way”, a framework to set out inclusive and progressive working practices
 - supported the Ban the Box campaign which seeks to create fair opportunities for ex-offenders
 - pledged to tackle mental health stigma in the workplace through the Time to Change initiative.

Recent performance

- 5.16 Between 2013 and 2017, the Southbank Centre made notable progress in improving its employee diversity with a **51% increase in BAME employees**⁴⁰. It has also increased representation of BAME and disabled staff at managerial level by 2.9% and 2.4% respectively, and is committed to building on this in the future.
- 5.17 The Southbank Centre's efforts to build a representative workforce have been recognised, being awarded Small Employer of the Year at the Employers Network for Equality and

⁴⁰ Southbank Centre Workforce Equality Action Plan 2017-2022

Inclusion Awards in 2017, named one of the Times Top 50 Employers for Women for the fourth year in a row in 2018, and named in Business in the Community's Best Employers for Race list.

Case study: Accelerate, LEAP and BOP programmes

The Southbank Centre provides its staff members with opportunities to build their skills through the **Accelerate** programme, which supports D/deaf and disabled people, and people from BAME backgrounds in progressing in artist management. The positive action programme was launched in 2016, having been developed in partnership with the National Theatre and Royal Opera House. There were 19 participants in the first cohort and 9 participants moved into more senior roles within the arts. The programme ran for a second time in 2018, with another cohort of 19, with participants from the Barbican, the BFI, the British Library and the Tate.

Based on a wellbeing valuation assessment, **£39,000 of social value** was delivered through the 2018/19 Accelerate programme, accruing as a result of the targeted training provided to the 19 strong cohort.

The Southbank Centre also delivers **LEAP**, a programme which helps Visitor Experience team members develop business acumen, and **Bring Out Potential (BOP)**, a learning and development opportunity for hosts, retail, and management staff. A third of participants have moved into more senior roles at the Southbank Centre and another third have found work within the cultural sector when they progress.

"Being part of BOP revealed a career that is both at the cutting edge of technical and user experience innovation as well as developing existing skills I needed to make it a reality."
~Obi Chiejina, BOP participant

Source: Southbank Centre ACE submission, 2017/18, and Southbank Highlights report 2017/18

6. Creative Learning for All

Key messages

The Southbank Centre delivers a **creative learning programme** for schools, young people and adults, as well as arts sector professionals, providing creative learning pathways to inspire long term interest in the arts and culture sector. It delivers:

- Strong engagement with primary, secondary and SEN schools, reaching 13,600 students in 2018/19. This included a c. 50% penetration rate in local primary schools, including through Arts Explorers, a three-year programme with 6 Lambeth primary schools.
- Engagement with school teachers, 250 of whom were engaged in the same year through programmes like the Creative Learning Lab, generating £515,000 of social value as a result.
- Partnership working through formal education partnerships, like the Lambeth Cultural Education Partnership, South Bank Partners group across BFI, National Theatre and Rambert creative learning teams, and other local partners like the Lambeth and Southwark Music Services.
- Programmes for young adults and adults. The adults programme delivers a series of evening and weekend courses for all adults, and professional development activities targeting art sector professionals as well as other adults. 2018/19 saw noteworthy growth across both groups, at 210% and 179% respectively, delivering over £2 million of social value that year.
- Ongoing involvement in a bespoke Masters level course, in collaboration with King's College London, with a yearly cohort of 26 students.

Cultural pathways to higher level skills

The importance of creative skills

- 6.1 The UK arts and cultural sector makes a valuable contribution to the national economy by inspiring innovation, improving productivity, providing educational opportunities and boosting long term learning⁴¹. Studies show that children from low income families who take part in arts activities are three times more likely to get a Higher Education degree, promoting higher skilled employment opportunities in later life.⁴² The Southbank Centre's cultural engagement with schools in Lambeth and Southwark is therefore particularly important in helping to overcome the lower levels of social mobility in the locality, where around one in four children are eligible for free school meals⁴³. However, through persistent investment in this area, Lambeth is one of England's strongest performing local authority areas in closing the attainment gap between disadvantaged and other pupils, with over 70% of disadvantaged Key Stage 2 students attaining the level 4+ benchmark in reading, writing and maths combined (compared to 81% across other pupils)⁴⁴. Similarly, 55% of

⁴¹ ACE, The Value of Arts and Culture to People and Society

⁴² Cultural Learning Alliance, Imagine Nation: The value of cultural learning report, 2017

⁴³ Ofsted, Attainment Gaps Data Analysis Tool, 2014

⁴⁴ Lambeth, Narrowing the Achievement Gap: Good Practice in Schools report, 2015. Disadvantaged students identified according to eligibility for free school meals.

disadvantaged secondary school students in Lambeth go on to Higher Education level study, compared to just 43% of disadvantaged students across England.⁴⁵

- 6.2 The Southbank Centre also operates in a local context that suffers from a relatively high rate of unemployment at 7% compared to only 4.2% in England as a whole⁴⁶. Boosting employment and productivity is therefore significant for Lambeth and Southwark and the arts sector currently directly accounts for at least 1 in every 20 jobs in the area ⁴⁷, making the accessibility of these opportunities to local people of high priority.

The Southbank Centre's strategic commitment

- 6.3 Core to the Southbank Centre's ethos is a belief in the right of every child to a creative and cultural education, and the ability of creative subjects to teach essential life skills such as self-expression, collaboration, cultural awareness and empathy, and creative problem-solving. The Southbank Centre delivers a **creative learning** programme for schools, young people, adults, as well as arts sector professionals. By providing creative learning pathways across these demographics, it is intended to inspire long term interest in the sector and to spark creativity and skills as a result.
- 6.4 The Southbank Centre's objectives are to improve:
- **Access to the arts sector** – broadening experiences, building diversity and inclusion, obtaining future audiences and demonstrating the value of arts to the education sector
 - **Arts sector development** – inspiring and training arts sector professionals and sharing learning with professional networks such as the Institute of Creative Learning
- 6.5 The creative learning strategy works through three main programmes with a bespoke rationale for engaging with each target group: schools and formal learning, the young adults programme and the programme for adults and professionals.

Schools and formal learning

Key initiatives

- 6.6 The Southbank Centre's **schools programme** engages primary, secondary and Special Educational Needs (SEN) schools and reaches thousands of children every year across a wide range of artistic forms, from National Poetry Library workshops to classical concerts. This is viewed as some of its most important work, giving young people meaningful opportunities for self-expression and developing imagination and creativity, particularly important for children who are less socially mobile.
- 6.7 The programme is supported through a strong set of **strategic partnerships** across the

"The Schools Takeover Day is an invaluable experience for the children. They learn a vast number of new skills and gain so much confidence. We couldn't offer an opportunity like this without the support of the Hayward Gallery."

~Teacher

⁴⁵ DfE, Education statistics by LA district and pupil disadvantage – post 19 tables, 2014/15 destinations

⁴⁶ ONS, Annual Population Survey, 2018

⁴⁷ ONS, Business Register and Employment Survey, 2018

National Theatre, BFI Southbank, Rambert, and A New Direction, aiming to reach more primary and secondary schools across London each year. Outputs have included a primary school module for the London Curriculum with the GLA, and a programme of work focused on careers in the creative industries for Lambeth Council's Next Generation project. Representatives from the Participation Team also attend the Big Change Series, to keep up to date on and discuss ACE recommendations and research, in order to continually inform and improve the programme.

- 6.8 The Southbank Centre continues to have a close and positive relationship with its two bordering boroughs through two of its key **music partners**: Lambeth Music Service and Southwark Music Service. Together, they host a number of events to showcase and support the music services' activities across the year, including the Lambeth Music Festival where over 3,000 children from Lambeth schools perform across the week and the annual creative music and dance production, Southwark Splash. The Southbank Centre also collaborates with the Lambeth School Cluster made up of BLC, Windmill, Gipsy Hill Federation and Oval, which represents a meaningful pathway to reach local schools via trusted collaborators in the community.
- 6.9 The **schools programme** is extensive, offering everything from intensive long-term projects for local schools in Lambeth, to one-off workshops and festival days for schools across London and the UK. It engages students and teachers alike and is closely linked to the Southbank Centre's artistic programme providing children, young people and teachers with firsthand experiences with artists.
- 6.10 The **Creative Learning Lab** is designed to find new ways for the arts to be taught in secondary schools across the UK, and for teachers to have a creative approach in their classroom. A set of high-profile artists - LionHeart, Sarah Freestone and Neequaye Dreph Dsan – were matched with a school teacher to create lesson plans for mandatory subjects (English, Maths, Science, History and Geography). 60 school students at Key Stage 3 took part on the day, experiencing a fresh approach to the teaching of these subjects.
- 6.11 The Southbank Centre also delivers a locally focused **Arts Explorers** programme, a three-year programme working with 6 Lambeth primary schools. As a supporter of the **Arts Award** and an **Artsmark Partner**, the Southbank Centre encourages young people to fulfil their Arts Awards through the range of young people's activity that is provided year-round. Since late 2019, the Southbank Centre has run a remodeled Associate Schools programme to specifically target schools that are not currently engaged, working with them over a sustained period to achieve confident arts leadership and their Artsmark status.

“What is really exciting about the Southbank Centre is the remit and scope of their activities. Although they are an organisation with a national remit, they are very keen on working with their local schools. The fact that that's a priority for them shows how they are balancing their responsibilities at the national level with those for Lambeth.”

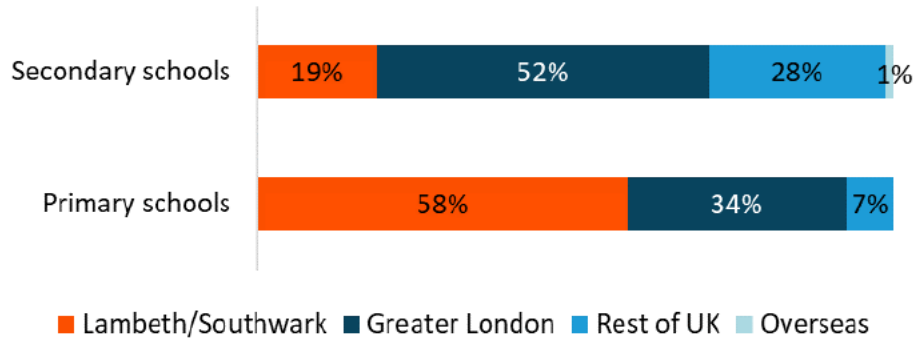
– Lambeth Cultural Educational Partnership

Recent performance

- 6.12 In 2018/19, over **13,600 school students** were engaged in creative learning activities at the Southbank Centre, 62% of whom were primary and 38% secondary school age. This equates to a total of **138 primary schools** and **156 secondary schools** participating, and Figure 6.1 shows their spread across local boroughs, Greater London, UK and overseas.

The Southbank Centre achieved a penetration of 50% of the total primary schools across Lambeth and Southwark and 47% of the total secondary schools⁴⁸ that year.

Figure 6.1 Primary and Secondary schools engaged by location, 2018/19

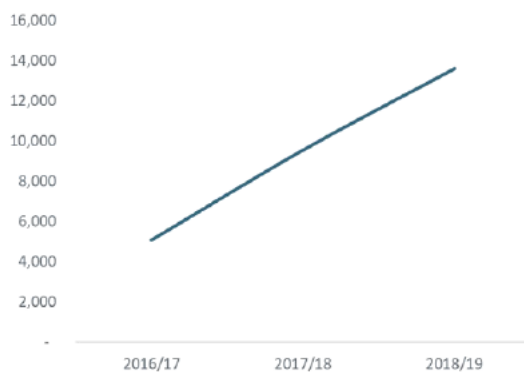


Source: Southbank Centre Schools data, 2018/19.

- 6.13 As well as students, over **250 teachers** participated in creative teaching opportunities across the same year. Total student and teacher engagement has grown strongly since 2016/17, by 42% and 28% respectively, as shown by Figure 6-1 and Figure 6-2.

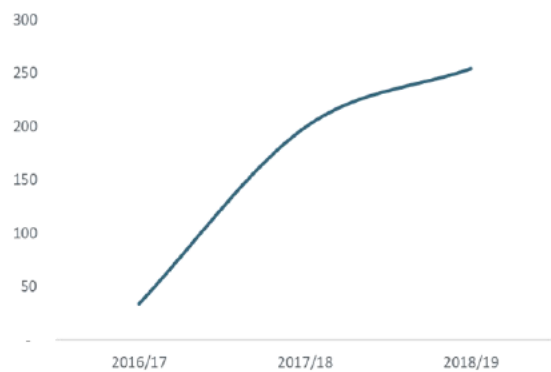
Wellbeing valuation assessment suggests that a total of **£515,000 of social value** was delivered as a result of the creative teaching opportunities provided to the 250 school teachers in 2018/19.

Figure 6-1: Total students engaged



Source: Southbank Centre Schools Data.

Figure 6-2: Total teachers engaged



Source: Southbank Centre Schools Data.

⁴⁸ Based on 2019 Government data on total primary schools (n= 71) and secondary schools (n= 28) in Lambeth, and total primary schools (n= 86) and secondary schools (n= 34) in Southwark.

Case study: Imagine a Story – a writing project for schools

As part of Imagine Children's Festival 2019, the Southbank Centre invited teachers to take part in a writing project inspired by the game of 'consequences', in partnership with celebrated children's author Joseph Coelho. Joseph set a framework for a story and supported teachers to complete separate elements of the tale with their students. These unique segments of the story were then combined together to make one complete and imaginative story which was performed by Joseph Coelho at the festival.

The school group authors were all invited to hear the story they helped to write and to meet their fellow story contributors from across London, and each school received a printed and illustrated copy of their completed story. The stories were read again to families and children during the half-term festival.



The project aim was to inspire and support children as creative writers and motivate them to continue to develop their writing and reading back in school and beyond, as well as support teachers to guide creative writing in the classroom. The project also supported several areas of the KS2 curriculum, and the teachers took part in a professional development workshop with Joseph Coelho and were given resources to support their in-classroom writing.

"The project is very beneficial especially for the children who live in deprived areas and do not really have the privilege to do certain things in their child life. This gives them the opportunity to explore and enjoy arts with no pressure and in a fun way."

Teacher feedback

Each year represents a bespoke festival. Imagine Children's Festival 2018 was delivered in partnership with Hats of Faith and explored a new interfaith children's book with Chineke! Juniors - an orchestra made up of majority BAME players aged 11 to 18 years.

Young adults

Key initiatives

- 6.14 Part of its broader **youth programme**, the Southbank Centre delivers the **Young Creatives programme** – bespoke projects and opportunities to develop skills and talents in producing, programming and curating. Example projects are Violet Nights, Kader Attia Film and Photography Course and Kiss My Genders.
- 6.15 The youth programme ensures **young people's voices** are heard as artists, speakers, producers and creatives within the year-round programme. A highlight of the youth programme in 2017 was the *WHY? Residency* which brought together 15 young artists and activists from across the UK for a week of training and development. The week included a

summit day for another 100 participants, and the Southbank Centre has continued to support and develop these young artists throughout 2018/19.

Wellbeing valuation assessment suggests that this continued support in 2018/19 has delivered over **£5,500 in social value** accruing to the 15 young people benefitting from this ongoing engagement.

- 6.16 More recently, *Violet Nights* is a monthly youth event for discussion and performance, featuring artists, politicians and industry professionals on panel discussions run by young people (see case study below).
- 6.17 As part of its commitment to young people the Southbank Centre also hosts a number of youth arts organisations through **on-site residencies**, offering them rehearsal space and performance opportunities, as well as working collaboratively with them when possible. This includes *Tomorrow's Warriors* and *Kinetika Blocco*, as well as relationships with the *National Youth Orchestra of Great Britain* and *ZooYouth*.

Case study: Violet Nights discussions and podcasting course

Violet Nights is a free monthly event curated by young people, for young people. In a more relaxed format to panel discussions, people aged 18-30 have the opportunity to exchange ideas and engage with issues that feel important to them. Topics are often selected by the Southbank Centre apprentices and on-site youth groups. Past events have included an exploration of queer activism, now and in the future, body politics in an age of social media, and a debate on the phenomenon of cancel culture.



Source: Southbank Centre website

To ensure a wide set of young people can be part of the conversation, the team behind Violet Nights have launched a mini podcast series. These short 20-minute podcasts go behind-the-scenes, with highlights from each month's event and interviews with speakers who are leaders in their fields. Working alongside podcast experts, the series also gives 18-25 year olds the opportunity to develop valuable skills as part of a two-day podcasting course where they work on a Violet Nights event. These skills include learning how to produce, edit and publish their own podcast.

Adult & professional learning

Key initiatives

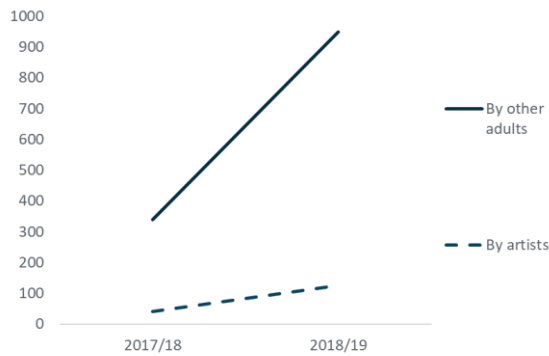
- 6.18 The Southbank Centre's **adult programme** is also delivered across two distinct strands:
- **Evening and weekend courses** available to the public such as Hayward Exhibitions, Literature courses, Gamelan percussion courses and VoiceLab workshops.
 - **Professional development projects** such as Women in Music, Composers Collective and an Organ Scholarship.
- 6.19 The Southbank Centre also collaborates with the University of London's Kings College to deliver an **MA in Education in Arts and Cultural Settings**. The 26 strong cohort benefits from study with both leading academics in education research as well as the Southbank Centre's Learning and Participation team to study the institution's pioneering approach to creative learning. The students are supported to apply this to their study, including through an applied work placement.

Recent performance

- 6.20 As Figure 6-3 and Figure 6-4 show, 2018/19 engagement levels in these activities soared since the previous year, growing by 210% for engagement of artists and 179% for

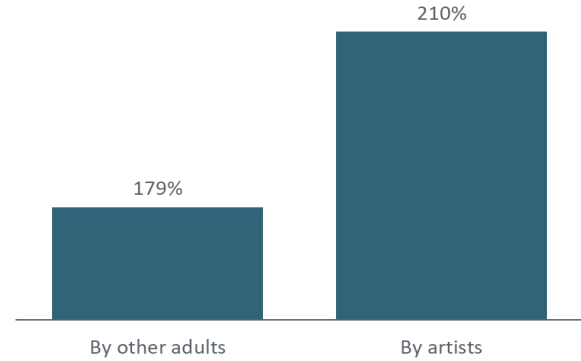
engagement with other adults. This demonstrates the increasing influence that the Southbank Centre is achieving in the arts and cultural sector through its work to inject long term interest and high-level skills into the creative industries. This activity is particularly important to the sector given that a high proportion of arts and cultural employers are small businesses which cannot afford to invest in workforce development, compounded by an undersupply of suitable training opportunities for the sector, as found by the Arts Council England evidence review into skills in the arts, creative and cultural sector⁴⁹.

Figure 6-3: Professional training attendance by artists & other adults



Source: Southbank Centre, ACE stats 2017-2019

Figure 6-4: Growth in professional training attendance by artists & other adults



Source: Southbank Centre, ACE stats 2017-2019

Based on a wellbeing valuation assessment for 2018/19 participation figures, an estimated **£1.9 million of social value** was delivered as a result of the professional training for artists, and over **£260,000** of social value was delivered through the training provided for other adults.

⁴⁹ ACE, Leadership, Workforce Development and Skills in the Arts, Creative and Cultural Sector: Evidence Review, 2017

7. Creative Health & Wellbeing

Key messages

The Southbank Centre is committed to demonstrating the important role of arts and culture in improving public health and wellbeing, and increasingly is acting as a sector leader and convener in this area. It delivers impact through:

- A community level programme of creative health activities including (B)old, a highly successful festival for older people that attracted 6,000 attendees in 2017 and which has led to a variety of ongoing projects. The Southbank Centre has created a new role to coordinate this area going forwards.
- Dedicated analysis of audience and visitor wellbeing, including HeARTs, a new partnership with the Royal College of Music to monitor this longitudinally. ALVA data from 2018/19 shows the Southbank Centre achieved a 2-6% uplift in wellbeing scores compared with all other London destinations.
- A strategic focus on proving, demonstrating and advocating the power of arts and creativity to reduce social isolation and loneliness, with the aim of influencing UK policy across the health and arts sectors. The Southbank Centre held the first Creative Health Conference in 2019 with 700 attendees, and this year has been announced as the host for the National Academy of Social Prescribing in partnership with NHS England and other key players.

Bringing arts & culture into the health ecosystem

The importance of the arts for health

- 7.1 The vital role that arts and culture plays in boosting health and wellbeing outcomes for individuals and communities is increasingly recognised across the public sector. As detailed in the landmark report *Creative Health: The Arts for Health and Wellbeing*⁵⁰, the creative sector is making great strides in helping to keep people well, aid recovery and support 'longer lives, better lived' across the UK. Music therapy, for example, has been found to reduce agitation and the need for medication in 67% of people with dementia, whilst an arts-on-prescription project has seen a 37% drop in GP consultation rates and a 27% reduction in hospital admissions.⁵¹ A study conducted within deprived communities in London found that, of those people who engaged with the arts, 79% ate more healthily, 77% engaged in more physical activity and 82% enjoyed greater wellbeing. Government analysis of arts participation rates in England estimates that NHS cost savings achieved due to reductions in GP visits as a result of these wellbeing benefits is in the region of £168 million per year.⁵²
- 7.2 As a result, the arts sector is increasingly being seen as an integral partner in the development of local health and social care plans. With a proven ability to positively impact issues including health inequality, mental health, long-term conditions, and ageing, the creative and cultural sector makes an invaluable contribution to a healthy and health-creating society.

⁵⁰ All Party Parliamentary Group on Arts, Health and Wellbeing Inquiry Report, 2017

⁵¹ NHS blog: Getting creative to change people's lives <https://www.england.nhs.uk/blog/getting-creative-to-change-peoples-lives/>

⁵² As above

The Southbank Centre's commitment to change

- 7.3 The Southbank Centre has long been an advocate of the role that arts and culture plays in improving the health and wellbeing of individuals and communities. From its conception with the 1951 Festival of Britain, described at the time as “a tonic for the nation’s wellbeing” following the Second World War, to the recent Changing Minds festival, a dedicated weekend-long festival which explored mental health and the arts, the Southbank Centre is committed to driving change in conventional thinking and practice.
- 7.4 In more recent years, this has been formalised through a strategic programme to address social isolation and loneliness, in response to the UK Government’s 2018 strategy for tackling loneliness. This is delivered as part of the Creative Learning programme, with an aim to use the physical site and the artistic programme to build communities by bringing individuals together and promoting a sense of belonging. The strategic focus of the Southbank Centre’s health and wellbeing work is therefore on proving, demonstrating and advocating the power of the arts to reduce social isolation and loneliness.
- 7.5 Where possible, the Southbank Centre also looks to identify key partners to build community, education, commercial, political and academic partnerships to promote greater influence on the wider health and wellbeing agenda.

Enhancing community wellbeing

Key initiatives

- 7.6 As part of the Southbank Centre’s **community outreach** work, a new role has been created within the Creative Learning team. The **Creative Learning Manager - Arts and Wellbeing** will oversee and deliver the new programme within the community, structured by five key areas: exhibitions, concerts, singing, social dances and creative writing. Examples include the Southbank Centre’s long relationship with *Streetwise Opera*, a singing group dedicated to people affected by homelessness; the *Singing for Breathing* group which uses singing to help people tackle the symptoms of COPD and other respiratory conditions; and the Southbank Centres’s *free afternoon tea dances* which are

Using a wellbeing valuation approach, an estimated **£47,500 of social value** is delivered through the social tea dances each year, based on an average of 350 monthly attendees.

- 7.7 The Southbank Centre’s **festival programme** also includes specific recognition of the importance of health and wellbeing, and the recent *(B)old festival* for older audiences and artists was a notable success at drawing in new visitors and helping to tackle social isolation (see case study below). This has led to regular programmes for people with a dementia diagnosis: *(B)old Moves*, a bespoke dance course and *(B)old Words*, a poetry course run in partnership with the National Poetry Library.
- 7.8 The **physical site and facilities** are also used by the Southbank Centre to promote positive change through health, including:
- **Grounded EcoTherapy** – a rehabilitation project run jointly by the Southbank Centre and Providence Row Housing Association for people who have experienced homelessness, addiction and mental health problems, promoting horticultural skills and building confidence. The regular 10 participants built the Queen Elizabeth Hall Roof Garden and continue to maintain it, having a positive impact on their outlook on life. This is delivering **£7,500 of social value** each year for these participants.

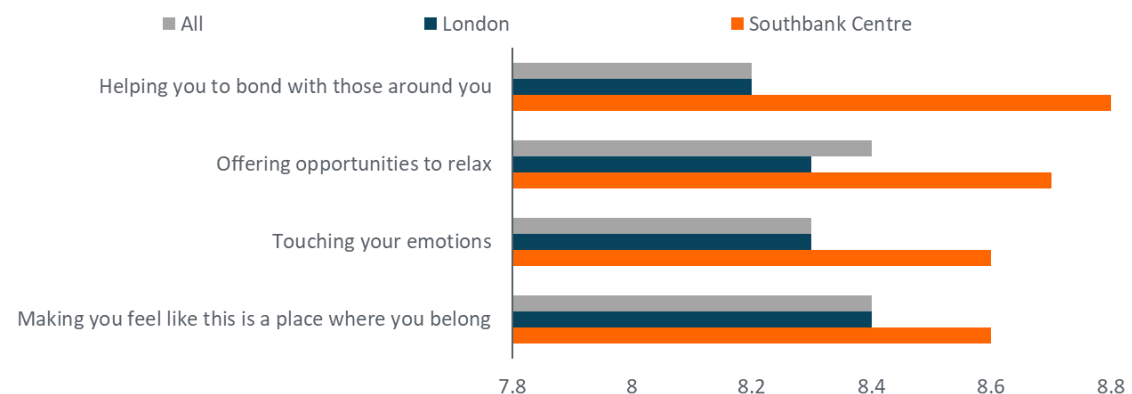
- **Open Foyer Policy** – in 1983, the Royal Festival Hall opened its doors seven days a week in line with the Greater London Council’s new ‘Open Foyer Policy’. Since then, the Southbank Centre has continued to act as a community asset for all, and the site offers a wide range of foyers, lobby and open spaces for community and social groups to meet informally.

Recent performance

- 7.9 The Southbank Centre is taking a leading role on promoting positive mental wellbeing, as shown by 2018/19 ALVA data on visitor emotional wellbeing measures. Figure 7-1 demonstrates that the Southbank Centre visitor scores are considerably higher compared to other ALVA attractions in London and across the UK. The Southbank Centre scores 2-6% higher than London averages across all emotional wellbeing measures.

Based on a wellbeing valuation assessment of the average 4% uplift in wellbeing experienced during the 4.45 million visits that Southbank received in 2018/19, this equates to over **£14 million of social value** accruing to those individuals, above and beyond that experienced across all other ALVA London sites.

Figure 7-1: Average score of Southbank Centre visitors compared with London and UK ALVA visitors across emotional wellbeing outcomes (out of 10)



Source: ALVA survey data 2018/19

- 7.10 The Southbank Centre also undertakes its own **bespoke analysis** in this area, running interviews, surveys and discussions to monitor the impact of specific activities on visitor wellbeing. In 2018, they found that participants came away from the projects feeling happier, more confident, more connected to other people, emotionally stronger and empathetic towards others in society. Their qualitative feedback included:

- “The project improved my confidence and feeling of self-worth.”
- “It kept me sane in a period that was very difficult personally.”
- “It has increased my empathy with world issues.”
- “I feel more connected to the community I live in and have found my voice to speak out for what I believe in.”

- 7.11 Southbank is building on this through a specialist study as part of the **HEarts programme** with the Royal College of Music to evaluate baseline levels of wellbeing and social

connectedness measures of its visitors⁵³. Visitors at 12 arts events in May 2019 were asked about their wellbeing, social and emotional loneliness and social connectedness in their daily lives. The baseline HEarts study found an estimated 40% of visitors feel lonely at least some of the time. According to the UK's Community Life Survey undertaken in 2017, this compares to just 22% of adults who feel lonely at least some of the time in England. The survey will be repeated over time in order to track the Southbank Centre's progress in achieving its health and wellbeing aims, and future HEarts reports will provide a clearer picture of this issue.

Case study: (B)old festival

The Southbank Centre is keen to ensure that older creative professionals are well represented in their artistic programme, at the same time as finding ways to contribute to tackling the epidemic of social isolation among the elderly. This led to the (B)old festival in 2017, a dedicated seven-day celebration, dedicated to older performers and designed to appeal to mature audiences.



Source: Southbank Centre website

The festival was supported by the Baring Foundation and the Rothschild Foundation, and featured a line-up of participants all aged over 65 presenting poetry, literature, dance, theatre, music, visual art, drag and comedy. There were also opportunities for audiences to get involved, including an experimental theatre piece by Christopher Green called *Welcome to the Home*.

The first festival of its kind, (B)old was hugely successful with **6,000 attendees, of which 26% were aged 65 or over, and of whom 74% said it had boosted their sense of happiness**. As a result, the Southbank Centre renewed its commitment to including older performers and participants across the whole artistic programme, and have introduced the (B)old Words poetry course and (B)old Moves dance course, both for people with a dementia diagnosis (as outlined above).

Bringing arts and health together

Key initiatives

- 7.12 Alongside its community initiatives, the Southbank Centre also engages at a policy level through its work to bring together the arts sector with the health and care sector. Its growing influence in this area led to the Southbank Centre hosting the inaugural **Creative Health Conference** in June 2019, which brought together 700 attendees with a focus on innovation for social isolation and loneliness (see case study below).

⁵³ The Southbank Centre and the Royal College of Music, HEarts and the Southbank Centre, September 2019

- 7.13 Building on its reputation as an arts and cultural leader in this space, the Southbank Centre recently announced it will host the **National Academy of Social Prescribing** (NASP) for 2020/21⁵⁴. NASP is a national NHS England programme which champions the importance of social prescribing, builds partnerships and grows the research and evidence base. This is part of the NHS Long Term Plan to harness the power of arts and cultural activities through a roll out of social prescribing, with an aim that 900,000 people will be referred to schemes by 2024. The Southbank Centre's involvement is expected to drive more effective engagement with a wider set of art and cultural organisations and groups than NASP would otherwise be able to achieve.

"It's a match made in heaven. The Southbank Centre will help NASP to engage with a new audience we might not otherwise get to, and NASP will help Southbank to develop community focused activities that strengthen the Southbank Centre's role."

Bev Taylor, Social Prescribing Development Manager

- 7.14 The Southbank Centre's long-term plans in this area include working with three new programme partners annually, to design, pilot and run a module for Link Workers on arts and health to strengthen existing commitments, and to deliver a nation-wide project around creative health in the coming years. The overall objective is to regularly convene local and national government bodies on this topic, seeking palpable policy change within the next three years.

⁵⁴ Please note this has been postponed due to the closure of Southbank Centre venues due to COVID-19, but NASP remains a significant strategic partner.

Case study: Creative Health Conference⁵⁵



In 2019, the Southbank Centre held its first Creative Health Conference as the inaugural event of the UK wide Creativity and Wellbeing Week. The conference was presented by the Southbank Centre in association with the All-Party Parliamentary Group on Arts, Health and Wellbeing, London Arts in Health Forum, Arts Council England, and the Centre for Performance Science (Royal College of Music and Imperial College London).

The free event explored how creativity can change people's lives for the better and brought together 700 artists, practitioners, funders and policy makers in the arts and health sectors. Of those attending, 68% were from within London, including 14% from Lambeth and Southwark and for 64% of attendees this was their first booking at the Southbank Centre.

Based on a wellbeing valuation assessment, over **£120,000 of social value** was delivered by the Creative Health Conference, accruing to the 700 attendees.

The event focused on innovation in tackling social isolation and loneliness and speakers included the Secretary of State for Health and Social Care, Chief Executive of the NHS, and the Minister for Arts, Heritage and Tourism.

In developing the programme, the Southbank Centre consulted an external stakeholder steering group of the Department for Health and Social Care, the Department for Culture Media and Sport, the All-Party Parliamentary Group for Arts Health and Wellbeing, NHS England, the Culture Health and Wellbeing Alliance, and various parliamentarians.

The Southbank Centre hopes to hold a subsequent Creative Health Conference⁵⁶.

⁵⁵ <https://www.southbankcentre.co.uk/whats-on/133956-creative-health-conference-2019>

⁵⁶ The current situation with COVID-19 may require this timeline to shift, or to take the conference on-line.

8. Placemaking and Partnerships

Key messages

The Southbank Centre has played a pivotal role in the long-term regeneration of the South Bank area since the 1950s, is a key member of the Cultural Quarter, and works with a range of local partners to invest in its continued development. The Southbank Centre:

- sits at the heart of the Cultural Quarter, along with the National Theatre and BFI
- is an active partner in South Bank Employers Group as well as a range of other forums and community groups promoting long term investment in the local area.
- invested £35m in major refurbishment of the Queen Elizabeth Hall, Hayward Gallery and Purcell Room, which were reopened in 2018.
- plays a critical role in the vibrancy of the area, with a total footfall on the site of 31.8 million in 2018/19, an 86% increase over 10 years
- delivers a public festivals programme which attracted an audience of 42,800 in 2018/19, delivering £235,000 of social value.
- hosts 64 commercial partners on site including traders, pop-up enterprise, and retail, food and beverage outlets. Collectively these employ an estimated 400 people.
- has supported Long Live Southbank, a grass roots organisation set up to maintain and enhance the South Bank skate park. A joint crowdfunding campaign was run for the space, which gained support from the international skateboarding community, the general public, businesses and philanthropists.

Culture as a catalyst for inclusive growth

Importance of culture for local growth

- 8.1 Culture-led regeneration is well established in UK policy, and arguably has a higher profile than ever before. There is now clear acknowledgement of the civic role that arts and cultural institutions can play as place-based catalysts to deliver growth and drive sustainable regeneration. These impacts can range from growth in tourism, creative and cultural sectors, to enhancing individual skills, knowledge and confidence, to strengthening community resilience and placemaking.⁵⁷
- 8.2 Culture-led approaches help to bring creative industry workers into an area, causing creative businesses to cluster and accumulate over time creating a range of employment opportunities⁵⁸. Combined with the stimulation of visitation and footfall, and an influx of cafes, restaurants, shops and hotels to accommodate the increased flow of visitors and workers, areas like London's South Bank have evolved to become attractive and thriving neighbourhoods made up of dynamic, creative economies and communities.
- 8.3 Lambeth's recent Creative and Digital Industries Strategy for Growth, "A creative way to grow"⁵⁹, sets out a vision for the area to continue to build on the distinctive and creative

⁵⁷ GLA, Culture-led regeneration: achieving inclusive and sustainable growth, 2019

⁵⁸ ACE, Economic Impact of Arts and Culture on the National Economy

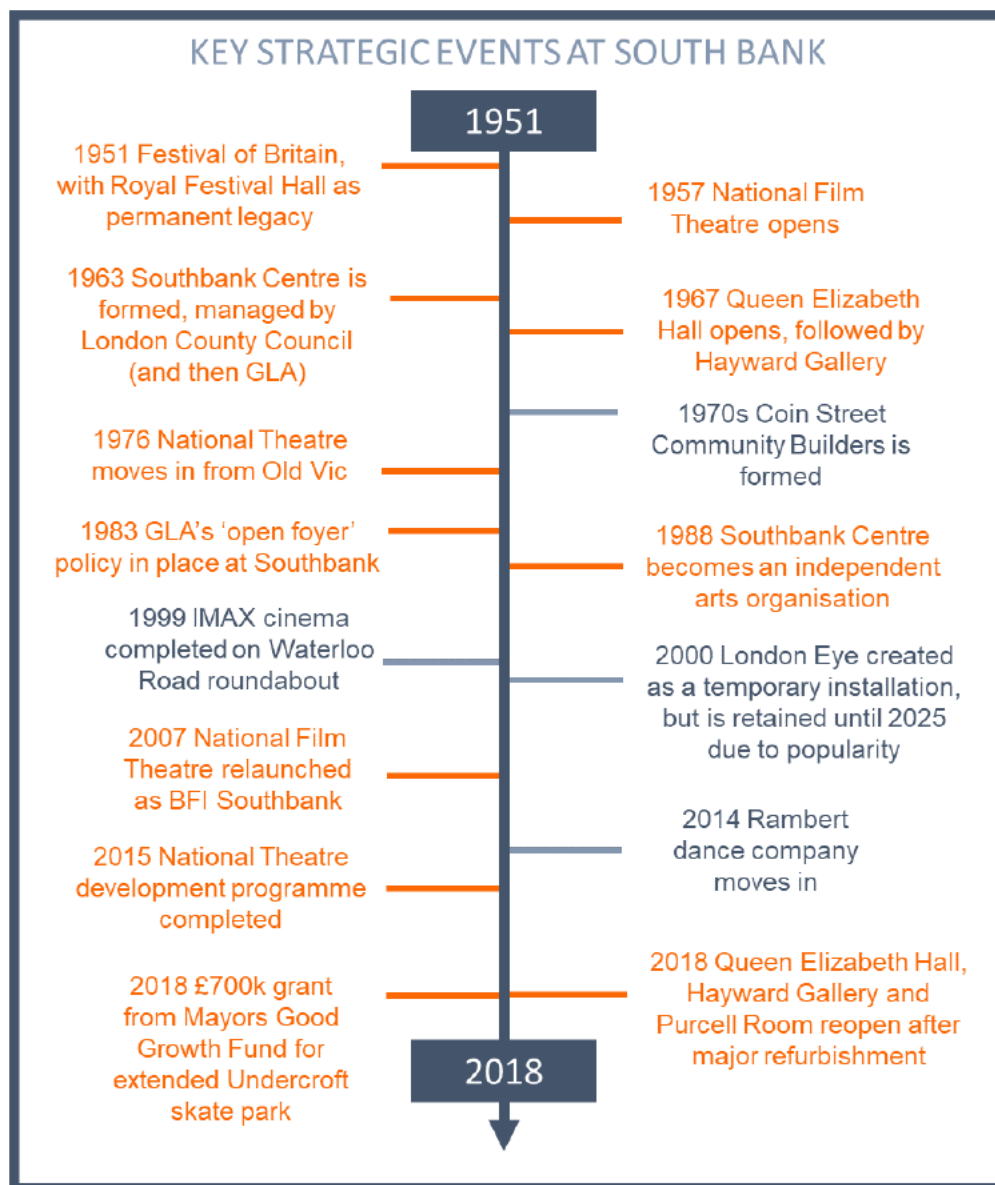
⁵⁹ Lambeth, Creative and Digital Industries Strategy for Growth, A creative way to grow, 2019

assets already in place and grow productive clusters of collaboration and innovation for the future. At the core of the strategy is a recognition of the strong relationships between organisations, business and residents across the borough, a unique ecosystem in which the Southbank Centre plays a pivotal role.

The Southbank Centre at the heart of the Cultural Quarter

- 8.4 The Southbank Centre has been a cornerstone of London's South Bank's **Cultural Quarter** both geographically and historically since its selection as the site for the Festival of Britain in 1951. Having suffered damage during the Second World War the derelict area became part of the original exhibition space. The Royal Festival Hall became a permanent centre for music, and the Southbank Centre was created. This in turn inspired the location of other cultural organisations in the area such as the National Theatre and British Film Institute, creating a cultural cluster around the South Bank of the river Thames (as shown in the timeline below), and paving the way for its continued evolution and development to become a cultural and creative industries hot-spot in London.

Figure 8.1 Timeline of key events in South Bank's Cultural Quarter



Source: Hatch Regeneris

- 8.5 The Southbank Centre continues to play a central place-shaping role in the South Bank and surrounding area, both through its own built environment investments as actioned through the Southbank Centre's Masterplan, and by responding to local strategies and plans, and working in partnership with its cultural, business and other strategic neighbours.

The Southbank Centre's role in the South Bank

Commercial development and employment

- 8.6 The Southbank Centre has long played a dynamic role in the regeneration of the South Bank area. As well as forming a central part of the cultural cluster, the Southbank Centre has helped to unlock commercial development within the area, both through its own investments and through wider strategic partnership work (see following section). The high levels of development in the area now form part of Lambeth Council's strategic plan.

Anticipating a future context when boroughs face increased reliance on local business rates and council tax, positioning Lambeth for more commercial-led development is a key component of its strategy. Recent developments of note are shown below.

Table 8.1 Development projects of note in the South Bank area		
Project	Description	Status / date
IMAX redevelopment	Feasibility stage for 130m high building on key gateway site.	N/A
IBM building	Proposed major redevelopment including an additional 20,000 sqm office space at site next to National Theatre.	Plans submitted Feb 2020
Elizabeth House redevelopment	Redevelopment will provide 1.5m sqft commercial space, a fraction less than the floorspace of Westfield, White City.	Consent granted 2019
Waterloo International Terminal	Major new shopping centre providing 200,000 sqft with 40 retail units and public realm.	Completion due 2021
ITV HQ redevelopment	Major office-led mixed-use development for HQ for ITV, proposing up to two 28 storey towners with residential and public space	Completion due 2020
Southbank Place former Shell Centre	900,000 sqft of new commercial space, 80,000 sqft new retail units, inc. restaurants and cafes, and 800 new homes. Delivered through joint venture Braeburn Estates, an SBEG member.	Completion due 2020
Waterloo Station extension	Redevelopment of International Terminal to provide 5 new domestic platforms.	Completed 2018
Doon Street Tower	Lambeth granted consent in 2012 to Coin Street Community Builders for redevelopment of mixed-use tower comprising residential and retail.	Consent granted, work tbc
York House / Urbanest	Student accommodation on Westminster Bridge Road blended with incubator space established by Wearewaterloo BID, inc. business support and education.	Completed 2015

Source: Hatch Regeneris – consultations and Waterloo & Southbank Economic and Cultural Vision 2017

- 8.7 As well as being one of London's busiest and most iconic cultural destinations, and an area undergoing rapid development, it is now twice as specialised in creative and digital industries employment than the rest of the city.⁶⁰ Lambeth has a strong growth profile of employment in the creative and digital industries and employment in these sectors grew by 23% between 2009 and 2015⁶¹ showcasing its successful evolution into a thriving, contemporary neighbourhood. However, issues related to a lack of affordable workspace mean its growth has lagged behind Southwark, as well as the London average of 36% in the same time period, although current levels of commercial development will improve this.

⁶⁰ Hatch Regeneris, Waterloo and Southbank Economic and Cultural Vision 2017

⁶¹ Lambeth Council and South Bank BID, Lambeth Creative & Digital Industries Study, 2017

Figure 8.2 Employment in the Creative & Digital industries in Lambeth, 2009-2015



Source: Lambeth Creative & Digital Industries Study, 2017

A trusted local partner

- 8.8 The Southbank Centre is actively involved in a number of local forums and community groups. The property director sits on the board of the long standing and active **South Bank Employers Group (SBEG)**, a non-profit which coordinates critical branding and placemaking work and oversees the South Bank Business Improvement District. The paid membership group brings together a diverse set of local landowners and business interests and promotes investment in the public realm, markets the area as a top-class London destination, and delivers a complex set of activities under the South Bank London brand.

“The Southbank Centre’s cultural offer and ethos is a big part of how we communicate through the South Bank London brand. Southbank are really involved in everything that we do.”
 Nic Durston, Chief Executive of SBEG

- 8.9 The Southbank Centre is also represented in the *Southbank Partnership*, a local political forum, *Southbank Forum*, a local public forum, and in the *South Bank and Waterloo Neighbours* steering group which is currently developing a new neighbourhood plan.

Investing in the physical site

- 8.10 The Southbank Centre continually invests in its historic built environment assets, preserving and managing its venues, an extensive public realm of terraces and squares, and animating these external spaces.

“It’s quintessentially London - local but global, open, vibrant, lively, tolerant and happy”

~Audience member

- 8.11 In 2018, the Southbank Centre reopened the Queen Elizabeth Hall, the Hayward Gallery and the Purcell Room after three years of intensive refurbishment under the ‘Let in the Light’ project. The project addressed one of the biggest long-term risks to the Southbank Centre: the restoration of the Festival Wing buildings. The repair and maintenance project

has comprehensively refreshed internal infrastructure and external furnishings of the buildings and has extended their economic life by another 50 years. The works were designed to lift and preserve the traditional, brutalist architecture once ranked as the ugliest in Britain. Improved access, ventilation and lighting systems, and new production infrastructure now provide a more welcoming experience for audience and performers alike, with a 21% increase in site footfall after the venues were reopened⁶². In 2018/19, the Southbank Centre reached **site footfall of 31.8 million** across the site and anticipated a growth in turnover from commercial and artistic revenue streams and through self-generated income of 62%, following the reopening of these iconic venues.

- 8.12 Its longer-term ambitions for continued placemaking are reflected in the statement below.

“We want to continue the work started with the Royal Festival Hall to make Southbank Centre a truly attractive and enjoyable public space that’s more suitable for artistic performances...Our ambition is to fully pedestrianise the route to the river between the Royal Festival Hall, Queen Elizabeth Hall and Hayward Gallery, to extend the popular Queen Elizabeth Hall Roof Garden, to create new performance spaces, and to improve the connections between Southbank Centre and its neighbouring area.”

Southbank Centre website, Our Future

- 8.16 The site also has a dedicated **sustainability strategy**, including being a zero to landfill operation with energy produced from the waste collected used solely for London Boroughs. This process represents a closed loop recycling solution which also reduces CO₂ emissions within the London area.⁶³

Animating the local area

- 8.17 The Southbank Centre works hard to animate its external spaces with regular art installations, and external stages, as well as fountains, an urban beach, its iconic skate park, and other pop-up activities.

“It’s a wonderful public space open to all, allowing people who do not experience art in their everyday to learn more and perhaps get engaged in the future”

- 8.18 Its **public programme** is made up of dedicated work presented for free across its open public spaces. This includes The Clore Ballroom, Queen Elizabeth Hall Foyer, Royal Festival Hall Roof Terrace and all other spaces accessible to the public across the site. The events and performances are open to everyone and aim to engage people in the art form as well as with each other. One of the main elements of this work is the **festivals programme**, which across 2019/20 included Easter, Refugee Week, Summer LGBTQI+, Africa Utopia, Meltdown, Literature, Winter, and Imagine festivals, and attracted a total **audience of 42,800**.

~Public feedback

Based on a wellbeing valuation assessment of the 42,800 visits made to the public festivals programme in 2018/19, this equates to **£235,000 of social value** accruing to those individuals across the year.

- 8.19 Public programming is combined with the sensitive integration of **commercial activity** across the site. As of 2019, there are now over **60 commercial partners** on site, with 14 external restaurants, cafes and shops, 10 traders operating a book market, 26 mixed

⁶² Southbank Centre Annual Report, 2018/19

⁶³ Southbank Centre ACE submission, 2017/18

market traders in the winter, and 11 further pop-up businesses hosted on a seasonal basis.⁶⁴

- 8.20 The Southbank Centre and its accessible public spaces also act as a natural congressional site through its informal '**open foyer policy**'. The site represents an open and inclusive space from 10am to 11pm daily for individuals, friends, social and other community groups to meet and spend time. As a result, the Southbank Centre now represents an important community hub within the wider neighbourhood, and its spaces are used by a variety of people including: professional workers, students, school groups, parent groups, language groups, graphic novel groups, artists, actors and dancers, homeless people, and families, friends and other social groups.

⁶⁴ Please note that this is a pre-COVID list of partners and may no longer be accurate.

Case study: Southbank skate park

The South Bank has been occupied for over five decades as one of the UK's most iconic skate spots, drawing skateboarders, BMXers and street artists from across the globe, as well as being a springboard of creativity.

However, sections of the park had been untouched since 2004 and were in need of restoration. In 2017, the Southbank Centre began to support Long Live Southbank, a grass roots organisation set up to maintain and enhance the South Bank skate park. They ran a joint crowdfunding campaign for the space, which gained support from the international skateboarding community, the general public, businesses and philanthropists.



“Southbank has a unique creative feeling and it’s great to see this supported by the Mayor of London. LLSB and Southbank Centre have been working hard to show what can be achieved through collaboration and we’re grateful to everyone who continues to donate and support the campaign.”

Louis Woodhead, Long Live Southbank

9. Investing in Art and Artists

Key messages

The Southbank Centre generates a series of positive spillover benefits on the wider cultural and creative industries ecosystem, through its work with artists, support of other institutions, and its wider lobbying and policy influencing work.

- The Southbank Centre worked with over 100,000 artists and creatives in 2018/19.
- Its talent development work stretches from professional diversity programmes to community and youth groups in residence. For example, in 2018/19, five women conductors were supported through the Women's Conducting Masterclass, delivering an estimated £10,000 of social value.
- The Southbank Centre manages the Arts Council Collection of loaned art works, and in 2018/19, over 1,650 works were shown in 126 different galleries and museums across the UK and internationally, reaching an audience of over 2.8 million people.
- The Hayward Gallery Touring programme held exhibitions at 80 other institutions across the UK in 2018/19.
- The Southbank Centre created a cross-organisation mentoring scheme in 2017, and last year had 80 participants from the Barbican, National Theatre, Royal Opera House, as well as the Southbank Centre.

A trusted partner in the sector

The Southbank Centre's strategic commitment

- 9.1 The Southbank Centre is dedicated to using its position as a premier UK arts centre to support the wider arts and cultural sector. It does this through three key channels:

Southbank Centre's commitment to the arts ecosystem		
Working with artists <ul style="list-style-type: none"> • Supporting continued excellence in the arts, diverse artistic programming and committed talent development and showcasing. 	Working with institutions <ul style="list-style-type: none"> • Supporting smaller institutions, networking and sharing expertise, sharing collections, and other formal partnerships. 	Lobbying and influencing <ul style="list-style-type: none"> • Addressing public policy and other arts and culture-related issues, as a premier UK institution.

Working with artists

Diverse programming

- 9.2 The Southbank Centre's artistic programming is wide-ranging and seeks to engage a **diverse set of artists and performers**. It is designed to engage and showcase the best art and artists from different cultures, backgrounds and forms. This includes:
- programming a high proportion of **international work**. In 2018/19, this was most notably through the Alchemy, Changing China, and Refugee Week festivals
 - showcasing art by **amateurs, community groups and other non-professionals**, including those from disadvantaged backgrounds. For example, its *Art by Offenders* exhibition is made up of artwork produced by offenders and people in secure settings, including patients in secure hospitals, young people in children's homes and immigration centre detainees. In 2017, over **21,000 visits** were made to the show.
 - working with a wide range of **artistic partners** to deliver this breadth of programme each year, including artist development partners, Associate Artists, community organisations in residence, direct commissions, and other special relationships. The case study below represents an Associate Artist partnership in action.
- 9.3 In 2018/19, the Southbank Centre worked with over **100,000 different artists and creatives** and recent brand research carried out by Muse⁶⁵ found that audiences has a positive perception of the Southbank Centre for its world class artists, high quality performances, and the diversity of its programming.

"The range of programming from different cultures offers different perspectives on art, culture and life. Truly unique when compared to other venues in London"

~Audience feedback

⁶⁵ Muse Marketing Strategy, Qualitative Brand Research Debrief 2017

Case study: Chineke! Orchestra

The first majority- BME orchestra in Europe, Chineke! Orchestra is one of the Southbank Centre's Associate Artists.



Chineke! Orchestra first performed in Queen Elizabeth Hall in 2015, just before its closure for refurbishment, and was invited back as part of the re-opening programme. The orchestra is recognised as creating world-class career opportunities for young BAME classical musicians. The Chineke! Junior Orchestra also performed at the celebrations of Queen Elizabeth Hall reopening.

Talent development

- 9.4 The Southbank Centre is committed to developing emerging talent through its **artist development partnerships**, as well as hosting a wide array of talent development networks and events including the *Composers Collective*, *Friday Lunch and Tonic* and the *Women in Music breakfast*.
- 9.5 The Southbank Centre also provides regular platforms for emerging performers through an array of **community and youth groups in residence**. For example, partners in developing younger talent include *Tomorrow's Warriors*, *Chineke! Juniors* and *Octavia Poetry Collective*, whilst the *National Youth Orchestra of Great Britain* is an Associate Orchestra and works with teenage musicians of all abilities. Similarly, the *Women in Music* programme provides opportunities for emerging female DJs, conductor's masterclasses, coaching for orchestral and jazz musicians and a women's orchestra.

Case study: Women's Conducting Masterclass

The Southbank Centre has worked with Marin Alsop for a number of years to tackle the lack of female conductors on international concert podiums. Together they offer a Women's Conducting Masterclass led by Marin and with the participation of the BBC Concert Orchestra.

In 2018, five talented women were chosen from 128 applications from all over the world. This gave the participants the opportunity to work with Marin and then conduct in front of an audience in the Royal Festival Hall. Those taking part reported it as a hugely positive experience, and one of the participants, Chloe van Soeterstede, was signed by an agent following her involvement.



Based on wellbeing valuation assessment, the masterclass programme delivered over £10,000 of social value for the five participating women in 2018/19.

Working with institutions

Supporting the wider arts ecology

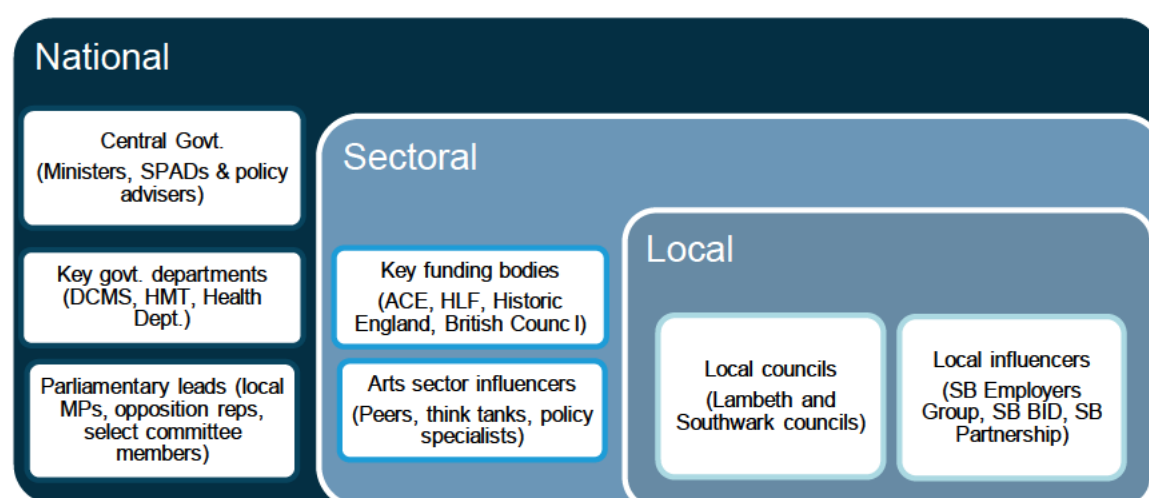
- 9.6 The Southbank Centre takes its national status seriously and aspires to reach out beyond its London base by supporting smaller institutions, networking and sharing expertise, sharing collections, and through other formal partnerships. This includes:
- **Hosting the National Poetry Library** with a collection of over 200,000 items
 - **Managing the Arts Council Collection**, a collection of modern and contemporary art work which is lent to galleries and public institutions throughout the country. In 2018/19, over 1,650 works from the Collection were shown in 126 different galleries and museums across the UK and internationally, reaching an audience of over 2.8 million people.
 - **Delivering the Hayward Gallery Touring programme**, which allows smaller galleries around the country to benefit from access to prestigious exhibitions. The Southbank Centre delivers two major exhibitions and a number of smaller-scale shows a year, created in collaboration with galleries, museums and art spaces across the UK. It held exhibitions in 30 venues across the UK in 2018/19.
 - **Delivering Momentum**, a cross organisation mentoring scheme created in 2017 which connects staff to a senior mentor from a different organisation. In 2018/19, the scheme had 80 participants across the Barbican, National Theatre and the Royal Opera House, as well as the Southbank Centre.
 - **Regularly sharing organisational knowledge and skills** by speaking at conferences, sitting on working groups and sharing initiatives, particularly about its work on workforce diversity.

Flexing institutional muscle

Lobbying and influencing work

- 9.7 As a premier UK arts institution, the Southbank Centre seeks to promote and lobby for positive change in the arts and cultural sector, and in society more widely. It also acts as a convener, bringing together key decision makers and creating new opportunities for dialogue, as with the Creative Health Conference across arts and health sectors, for example. The previous sections of this report have shown the Southbank Centre's ability to drive change in education and skills, health and wellbeing, and local place-shaping debates. To this end, the Southbank Centre is actively engaged with a range of stakeholders at different scales of influence, as outlined in Figure 9-1.

Figure 9-1: Stakeholders engaged at national, sectoral and local level



Source: Southbank Centre Public Affairs Strategy

Local, regional and international sponsorship

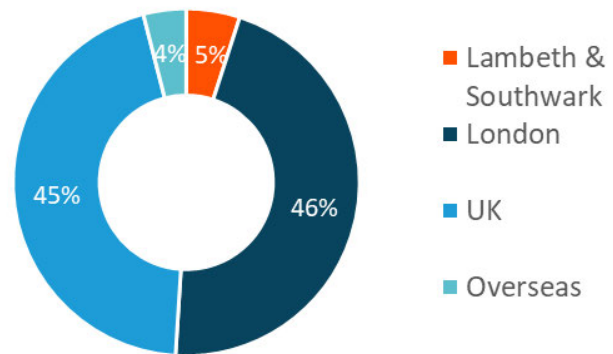
- 9.8 The Southbank Centre continues to combine its grant-in-aid funding with an array of other sponsorship, which facilitates the wide range of impactful work it delivers each year. It has maintained its proportion of self-generated income revenue against its public funding through ACE since 2015/16, at 58%. A key element of this is the successful leveraging of additional funding through individual donations, corporate funding and income from trusts and foundations both across the UK and globally.⁶⁶

⁶⁶ A full list of current trust and foundations acting in support of the Southbank Centre can be found here: <https://www.southbankcentre.co.uk/support/support-us/trusts-foundations>

9.9 It has raised an annual average of £1.24m over the last three years from Major Donors, Patrons, Supporters Circles and Audiences, nationally and internationally.

9.10 The Southbank Centre also works with over 70 trust and foundation supporters, raising an average of £167,000 per year. 69% of these organisations are UK-based, and the remaining 31% are based overseas.

Figure 9-2: Location of donors, patrons & sponsors



Source: Southbank Centre data, 2017-2019

Appendix A - Approach to impact assessment

A.1 The study has focused on two broad categories of impact:

Economic Impact

A.2 The methods used in this economic impact assessment are standard for this type of assessment and have been informed by the principles set out in the HM Treasury's Greenbook. Where it has been necessary to make assumptions in the assessment we have erred on the side of caution.

Impact Area

A.3 The assessment focuses on the economic contribution the Southbank Centre makes to the London (region) and UK (national) economies.

Measures of Economic Benefit

Direct

A.4 Direct benefits refer to the on-site employment and associated economic value that is created by the Southbank Centre.

- Employment numbers have been sourced from the centre for the financial year 2018/19. These are reported as Full Time Equivalents jobs (FTEs). These have been separated by those employed by the Centre and those employed in pop-up stalls.
- Gross Value Added (GVA) is a key measure of economic output. Estimating the GVA generated by organisations such as the Southbank Centre is more complex than for purely commercial businesses, given that they receive a large public subsidy. However, they do make GVA contribution that is recorded in the national accounts. Our approach to assessing direct GVA is consistent with the way the Office for National Statistics treatment of cultural organisations in the National Accounts. Here, GVA is measured as the sum of the compensation of employees and consumption of fixed capital.

Indirect

A.5 Indirect benefits refer to the economic benefits supported by the Centre's external operational and capital expenditure on goods and services. This expenditure supports employment and value added within the Centre's immediate suppliers and within all subsequent tiers of the supply chain, as the Centre's direct suppliers make purchases from their suppliers, and so on.

A.6 Expenditure data has been provided by the Centre for each branch. Information has been provided on the location of expenditure. We have used data from Companies House to allocate this expenditure to sectors, which has then been matched to those within the Hatch Regeneris input-output model for the UK Regions. The full economic benefits of this expenditure have then been estimated using our input-output model. The model is based on data from the UK National Accounts and allows us to estimate the supply chain multiplier effects from an initial injection of expenditure on a particular sector.

Induced

A.7 Induced benefits refer to the effects of spending by employees whose jobs are supported directly by the Centre and indirectly within the supply chain.

- Benefits from the spend of the Southbank Centre's employees have been estimated using data on salaries provided by the Centre. These have then been adjusted for taxes, National Insurance, pension contributions and savings rates. Our input-output model has then been used to estimate the multiplier effects from this spending.
- Benefits from the expenditure by employees in the supply chain have been estimated using the Type 2 (indirect and induced) multipliers within Hatch Regeneris's input-output model.

Visitor Economy

A.8 Visitor economy benefits refer to the benefits as a result of off-site visitor expenditure to the Centre. Impacts as a result of spend on-site (in the venues but not in the pop-up enterprises) are already taken into account with direct jobs and GVA supported at the Centre. Benefits from off-site visitor spend have been assessed in the following way:

- Data on visitor numbers to the Southbank Centre has been taken from ALVA. This covers:
 - Ticketed visitors to the venues at Southbank (sold directly by the Southbank Centre)
 - Visitors to other commercial events at the Southbank Centre that are sold by third party organisations (such as graduations and conferences)
 - Free admission visitors to exhibitions and festivals.
- Data on visitors' origin, and whether they stay overnight, have been provided by the Centre, based on visitor surveys carried out on-site by ALVA.
- Data on average spend on site at the Southbank Centre has been calculated based on data from the ALVA survey and the total number of visitors.
- We have then looked at the total average spend data for (i) day visitors (GB Day Visitor Survey for visits to museums, 2018) and (ii) overnight visitors (GB Overnight Tourism survey, 2018, and the International Passenger Survey, 2018). All of these data sources provide spend figures for visitors London.
- Subtracting on-site expenditure at the Southbank Centre from the total spend values from the GB Day/Overnight/International Passenger Survey data results in total off-site spend by visitors to the Centre.
- We have then used data from the Southbank Centre's ALVA visitor survey to determine how much of this spend can be attributed to their visit to the Centre. That is, how much is *additional* spend that would not otherwise have taken place. This takes account of the fact that some of the visitors (and hence their expenditure) would already have been in the region for other purposes.
- We have applied this additional off-site expenditure to spend categories using the latest UK Tourism Satellite Accounts.

A.9 This expenditure is then fed through our input-output model to estimate the total economic contribution of off-site visitor spend.

Social Impact

- A.10 This is the impact of the Southbank Centre, its projects and programmes on the lives of people and communities: whether working or volunteering at the sites themselves, visiting the centre, or participating in the many targeted initiatives that the Southbank Centre delivers and supports. While typically more intangible than economic impact, social impact can be quantified using a Subjective Wellbeing Valuation approach, which considers the intervention's role in enhancing individuals' subjective wellbeing.
- A.11 Wellbeing valuation provides a methodology for quantifying how people value non-market goods. For example, the value that accrues to an individual as a result of increased confidence or enhanced social interaction. These things are important but are not commonly expressed or measured in monetary values. Our approach uses financial proxies from a range of sources to help determine wellbeing values:
- HACT community investment values from the Social Value Bank⁶⁷
 - DCMS reports on the wellbeing impacts of arts and culture and⁶⁸, including health and educational benefits⁶⁹
- A.12 This methodology means that a specific financial proxy is selected for the wellbeing outcome being determined, such as engaging with arts and culture, general training, improved confidence, or feelings of belonging. Each financial proxy is different. This means that the highest impact is not necessarily achieved by the highest number of participants.
- A.13 The method also accounts for deadweight (i.e. what would have been achieved anyway, regardless of the intervention).
- A.14 This study has only applied wellbeing valuation to impacts experienced by adults, and therefore is likely an underestimation of the total impact being delivered by the Southbank Centre. This is because an intervention with high participation numbers made up predominantly of children will not have been included in the wellbeing impact calculations, even though there will be wellbeing impacts experienced by those under the age of 18.

⁶⁷ <https://www.hact.org.uk/social-value-bank>

⁶⁸

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/304899/Quantifying_and_valuing_the_wellbeing_impacts_of_sport_and_culture.pdf

⁶⁹

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/446273/Health_and_educational_benefits_of_sport_and_culture.pdf



www.hatch.co.uk

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