CREATIVE SCOTLAND
ALBA | CHRUTHACHAIL

City Region Edinburgh and South East Scotland consultation: Regional Prosperity Framework (2021-2041)

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Consultation Questions

How did we get here?

1. Are there any aspects of the development of the Region's economy prior to UK exit from EU and Covid-19 that are important to capture that aren't outlined here?

The Edinburgh and South East Region is home to a thriving scene across the arts, screen and creative industries. This includes the Edinburgh Festivals and other major festivals across the region, such as the Borders Book Festival and StAnza Poetry Festival in St. Andrews. In addition, there are many organisations across the arts, screen and creative industries which operate year round and in communities, providing a both a direct economic impact and an indirect impact in attracting people to live/work/remain in the area.

There is a flourishing screen industry, the expansion of which has been much enhanced with a new world-class film studio in Leith, alongside the studio at the Pyramids in Bathgate. In addition, the region is home to a diverse number of creative industries organisations, including textiles across the Borders and gaming and technology companies in Edinburgh and beyond. 36% of organisations which receive multi-year funding from Creative Scotland (Regularly Funded Organisations or RFOs) are located in the Edinburgh and South East Scotland Region and consists of organisations working across craft, dance, literature, music, screen, theatre, visual art and other specialisms. These organisations make a vital contribution to the current health and future development of the arts, screen and creative industries in Scotland. Details of the RFO network can be found here (https://www.creativescotland.com/funding/latest-information/funded-organisations/regular-funding-2018-21 .

The results of BOP Consulting's 2016 impact study show that the Edinburgh Festivals continue to be Scotland's world-leading cultural brands through developing their role as economic powerhouses of the tourism industry. Economic impact was measured at £280m in Edinburgh and £313m in Scotland, representing a 19% and 24% increase on the figures reported in 2010. 5,660 new FTE jobs were supported in Edinburgh and 6,021 in Scotland compared to 5,047 and 4,757 respectively in 2010. The Festivals also acted as tourism gateways to the rest of Scotland. In 2015, Festival visitors were spending more nights elsewhere in Scotland than in 2010, with the Festivals' role as sole motivation for travel increasing in significance. The full report can be accessed here (https://www.edinburghfestivalcity.com/assets/000/001/964/Edinburgh_Festivals_-_2015_Impact_Study_Final_Report_original.pdf?1469537463 .

The festivals also sustain a rich infrastructure of AudioVisual and event businesses that support tourism and conference business activity all year round. Screen Scotland is currently undertaking a comprehensive review of the economic value of screen sector, its sub-sectors and activities, in Scotland. Research is being conducted by Saffery Champness and Nordicity, findings are anticipated to be published in Autumn. We would welcome an opportunity to update with findings that may be useful to the framework.

2. Do you think there are opportunities from the Region's economy prior to UK exit from EU and Covid-19 that could help support recovery? If so, what areas / sectors are these?

Whilst some of these sectors have suffered disproportionately from both the exit from the EU and Covid-19, they all have the potential to play a crucial role in the recovery of the economy. The revival of the arts and the gradual re-introduction of performances will once again revitalise the region and its reputation as a major reason to visit for tourists. There is also a role to play in the regeneration of towns and other areas, to ensure that a cultural life is accessible and that there are opportunities to engage in culture across the region, not just in Edinburgh.

Some sectors, notably the screen sector and the world-leading games sector have not been as affected through the pandemic as other sectors. Indeed, within the screen sector, Scotland's international production market share has doubled while many games companies have continued to work seamlessly in the all-digital environment. The global screen production boom, and the attractiveness of the UK to international production, has resulted in Scotland being targeted as a production location and at a greatly increased scale of production. As the global production spend increases rapidly, driven by audience appetite for content from streaming platforms such as Amazon, Netflix, Apple + etc, the potential for addition studio space is a priority. Growth is projected to continue for the foreseeable future. The increase in screen activity has seen three major high-end television (HETV) series productions which have recently been attracted to the region. Currently, *The Rig* is filming at First Stage studio in Leith while an adaptation of Neil Gaiman's internationally best-selling *Anansi Boys* will commence production at the studio in the Autumn. The second series of global TV hit *Good Omens 2* is currently filming at Pyramids Business Park studio in Bathgate. All three of these are Amazon Studio productions and, with the facilities offered by these studios, there is the potential for this to be a major growth area for the region. Not only will this mean a high production spend, but also will mean an increase in ancillary jobs growth for local crews, in training opportunities and spend with local companies, including hotels, catering companies, transport providers and other organisations which supply production support to the film industry.

Our current regional economic profile

3. Are there any aspects of the Region's Economic Profile that are important to capture that aren't outlined here?

As mentioned above, there is little reference to the arts, screen and creative industries in the economic strategy. As outlined previously, these sectors have a significant role in the economy of the region, not least because of the potential for growth, but also their crucial role in attracting tourists and the implications for economic benefit from that. In this way, there is a primary and secondary economic benefit from these sectors. Not only do they contribute directly to the economy, through the organisations based here and their role in tourism, but they also contribute to making the region an attractive place to live and work, due to the diverse cultural life which can be experienced here, as well as the role that they can play in economic regeneration of areas.

Stimulating local creative and cultural life also contributes to the transition to a green economy and the idea of 20-minute neighbourhoods as the arts and creative industries come to be embedded within communities, instead of being focussed in large, urban hubs.

Regional impacts from UK exit from EU & Covid-19

4. From your experience, what are the main implications of COVID-19 and/or UK Exit from the EU, and what should the region do to 'build back better' from these 2 significant challenges?

The sections of the arts, screen and creative industries which rely on audience participation and engagement in particular have suffered hugely from being almost completely shut down throughout the pandemic. It is hard to say what the implications of this will be for the sector. Whilst performances are coming back and galleries are re-opening, we are aware that is not just a matter of restarting, but also doing so in a safe way and understanding if audiences will have the confidence to return. It is clear that engagement with the arts and culture has been important throughout the pandemic. According to Creative Scotland's latest research (Covid 19: Public intentions on returning as audience members; https://www.creativescotland.com/__data/assets/pdf_file/0006/87963/Creative-Scotland-Public-intentions-on-returning-as-audience-members-Wave-3-report-LR.pdf), a fifth (21%) of those surveyed said that engagement with the arts and culture had become slightly or much more important, with only 10% saying it had become less important. 57% agreed that they missed the chance to go to cultural events and venues.

Participation in cultural events at home, whether activities undertaken alone or watching content online, including live streaming has increased during the pandemic. This survey also looked at people's intentions to return to cultural venues. Whilst many were happy to return to outdoor activities and bars and restaurants, when it came to cultural venues there was a greater reluctance, with a majority stating that they would not be in a hurry or would not visit venues such as cinemas, museums, galleries, theatres or live music event. Many would not plan to visit these venues until later in 2021, if not 2022. Whilst some of this may be due to it not being clear what reopening would mean, it paints a more complex picture which is not simply that cultural venues will reopen and audiences will return.

The recovery for those parts of the sector which rely on audience engagement and participation may therefore be a long and complex road. Changes which have taken place due to Covid-19 and the exit from the EU which affect Scotland more generally will also have repercussions within the region. For example, if the move out of cities and towns is long term, then the impact of this needs to be considered. It then becomes crucial to ensure equality of access to a cultural and creative life across the region through geographical location of opportunities to engage.

In addition, an understanding needs to be gained of what role creativity and culture can play in rethinking our high streets. The region could support innovative use of venues for arts and cultural events, which will allow reassurance to be provided to audiences as they return to venues and events. Our survey showed that people would be more comfortable in attending open air or larger events, or online.

As highlighted in "A Culture Strategy for Scotland" (https://www.gov.scot/publications/culture-strategy-scotland/pages/4/#:~:text=The%20Vision%20for%20Scotland%201%20The%20national%20culture,for%20Contemporary%20Arts%20%28%20CCA%20%29%2C%20Glasgow.%20), community empowerment to develop cultural activity is considered key. In this period post-Covid-19, there is the chance to involve local communities in defining what opportunities would work best for them. This can also include innovative engagement with artists and creative practitioners to help local authorities and communities visualise change.

For those parts of the sector which do not engage directly with audiences, the picture is variable. A hallmark of the sector is that it is primarily made up of small and medium sized organisations. Some across the creative industries such as gaming companies have benefitted hugely from the pandemic and some areas have been able to pivot to online platforms, especially for retail, but others have been unable to work throughout the pandemic.

The Screen sector has been able to operate since August 2020 and has seen a marked increase in production spend across Scotland and in the Edinburgh and South East region. The question here is around how to support that increase and ensure that it continues, with a shortage of skilled crew members being crucial. Any support which can be given to increase the opportunities for training and skills development in this area will be key to its success and will also contribute to the effort to "build back better."

In addition, exit from the EU has affected the ability of artists, practitioners and crew to travel internationally both out from Scotland and into Scotland, due to the introduction of visas, work permits and cabotage restrictions around transporting instruments and equipment. This will add extra expense for those looking to bring performances, practitioners and productions into Scotland and to travel with them out to the EU. Many rely on international acts, especially festivals, so this will create a problem for programmers. It is not clear how or indeed if this will affect tourism from EU countries, as this has so far been severely restricted due to Covid-19 regulations.

Finally, support to attract and train skilled crew members for Screen production will ensure that this sector can continue to flourish.

Where are we going?

5. What do you think are the key challenges that the Region faces over the next 20 years?

As mentioned above, a key challenge for growing the screen industry in the region is the increased demand for an expanded skills base on both incoming and local productions. A long-standing issue for incoming productions has been finding suitable trainees who have to be prepared before they start work on a production and supported during their traineeship. Trainees are essential to each production. They are also the seedbed from which the crew-base grows. They contribute significantly to how well individual productions run, but also grow the regional crew base through work-based training. Investment into the growth of skills provision is a key priority for Screen Scotland with the imminent publication of a Skills Strategy and increased engagement with broadcasters and streamers.

An additional challenge is to ensure that these opportunities are inclusive and that there are no barriers to entry to the screen sector as a career path. Therefore, how to provide the opportunities for skills development in this area is a crucial challenge, as an impediment to growth will be the depth of the skills base which is available and the ability to continue to sustain the current trend of attracting international high-end production opportunities.

6. What are the key strengths that the Region has and that should be the basis of its future wellbeing?

The cultural and creative sectors which exist across the region is a key strength, but we should be careful that these organisations are supported to flourish and grow within diverse communities and not be dominated by central Edinburgh. Doing this is crucial to building thriving, local centres and promoting community involvement. This is especially important in more rural or deprived areas and equity of access is a key consideration.

Having access to a cultural and creative life can contribute strongly to wellbeing and building strong and engaged communities, with diverse facilities and rejuvenated High Streets. This is especially effective if the community is engaged and empowered to make decisions about opportunities in their area.

Our proposed vision for the future

7. Do you think this proposed Vision is realistic, ambitious and recognises the Region's distinctive characteristics and strengths? If not, what would you add or change?

Creative Scotland believes that the proposed Vision could do more to recognise the Region's strengths across the arts, screen and creative industries. To this end, we would welcome a more holistic approach which brings a wider focus than the purely economic measures. This would include a greater emphasis on the transition to a green economy and the inclusive growth and wellbeing agenda of the Scottish Government and the ways in which the creative and cultural sector are a significant contributor to this.

Our emerging strategic themes

8. Do you think that the three Regional Priority Themes of Flourishing, Innovative and Resilient provide an appropriate framework to focus our collaborations to maximise the potential of the region?

Creative Scotland believes the three themes outlined provide an appropriate framework for the region and resonate with ambitions for the arts, screen and creative industries. It would be helpful to allow for a wider focus within each theme, for example, innovation can also apply to the creative industries and screen and resilience is a theme for the development across the cultural and creative sectors.

It would also be useful to understand how the themes interact with each other and how intersectional activity mutually amplifies value, for example, the impact that a strong and resilient cultural and creative sector can have on sustainability, jobs growth and wellbeing.

9. Have you any further suggestions in terms of specific opportunities, asks and commitments that should be outlined within each theme?

Our big moves

10. What are your views on our proposals for a better-connected region?

We welcome these proposals and can see clear benefit for the arts, screen and creative industries within them.

11. What are your views on the regional pipeline opportunities outlined? What other major regional projects or initiatives should be considered, and do these fit within the suggested themes?

12. In terms of prioritisation, what should be the focus of activity in the first 3 – 5 years?

Our approach to delivery

13. Are there any important linkages that aren't captured here? If so, what are they, and how do these link with the Themes and/or the emerging regional "big moves"?

This section highlights the importance of the region 'culturally and creatively' however offers no clear support or prioritisation for cultural projects, organisations or plans. Missing linkages include any specific mention of the cultural sector in driving sustainable growth, or the role of artists and practitioners in helping local authorities and communities reimagine and re-think places and services (as per "A Culture Strategy for Scotland").

We would reiterate the role that the creative and cultural sector can play in community-led regeneration, including facilitating re-thinking of places/services and for re-shaping High Streets.

14. What role could your organisation playing in delivery, and what would you expect the regional partners to deliver to assist this?

Overseeing change

15. Do you think that your own organisation could play a role in achieving the objectives of the Framework? If so, in what specific areas?

As major funders of many individuals and organisations across the region, Creative Scotland can play a role in connecting the local creative and cultural sector to these plans, many of which are key to sustainable tourism or new roles and uses for town/city centres. For example, have cultural sector representatives been involved in strategically co-ordinating transport developments?

Creative Scotland can also link to national cultural partners who can support specific areas or advise on what is needed to support skills development.