



# **Cornwall cultural strategy evidence report**

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## **Key messages**

- Cornwall's environment is a national and international asset and is a key contributor to its economy and the quality of life for its residents and visitors.
- Access to the natural environment and green spaces is beneficial for health and mental well-being. Evidence shows that a substantial proportion of the adult population have physical activity levels insufficient to improve their health.
- Participation with cultural activities helps to create more cohesive communities and contributes to personal and social development.
- Children and young people in Cornwall have higher than average levels of involvement in community sports, dance or multi-skilled clubs but there is a significant variation in levels between the community network areas.
- Cornwall has a strong sense of identity and interest and use of the Cornish language is growing.
- The 2008 Place Survey reveals that activities for teenagers ranks highly in people's opinion of what most needs improving in their local area. This is considered as much of a priority for needing improvement as affordable housing. Children and young people also want more spaces to play and things to do.
- The cultural sector is a key contributor to Cornwall's economy and helps to attract people to live, work and visit.
- Employment in the cultural sector is rewarding but sometimes competitive due to limited opportunities. Earnings are often not commensurate to qualifications.
- Heritage plays a unique role in shaping people's sense of belonging and also the regeneration of communities. Cornwall has a high proportion of listed buildings and heritage assets that need conserving through well planned and sustainable development.

## **Culture in context**

*The importance of culture, leisure and sport in addressing issues such as social inclusion, health and crime is becoming increasingly apparent.*

(Department for Culture Media and Sport)

Cultural activity strengthens the bonds between people, improves our quality of life, promotes learning and enables us to engage with our surroundings. It can also help us to regenerate neighbourhoods and help us to embrace diversity. Strong cultural provision can help to create sustainable communities, as defined by the Government, as those where people want to live and that promote opportunity and a better quality of life for all.

Local authorities and their partners have a key role to play in providing cultural infrastructure and activities for their communities. From publicly funded museums, libraries and archives to culture-led regeneration and spatial planning. These services are fundamental to delivering the Sustainable Community Strategy and its vision for Cornwall as a 'special place of harmony and beauty: a prosperous, happy place that values its communities, environment and economy equally and enables one and all to achieve the highest possible quality of life'.

The population of Cornwall is growing and changing. Over the next 20 years the population is expected to grow by 27%. However, this growth will not be consistent across Cornwall and some areas will experience a decline (2007 ONS). Longer life expectancy, an increase in the number of births and a reduction in outward migration are contributing to the overall growth.

The population of Cornwall is getting older but what it means to be old is changing too. Older people are living longer, with more active lives, working longer but are still likely to need more intensive care and support at the end of their life.

Recent migration trends have seen fewer young people leaving Cornwall. The majority of people moving to, or returning, are of working age and are getting younger. These population trends and shift in behaviours will impact on the need and provision of community facilities and cultural services. As the population evolves, cultural facilities and events will need to adapt to this change.

## **Measuring performance**

As part of the new National Indicator set for local government, four indicators have been developed to monitor and encourage the enjoyment of culture and sport. These are:

<b>National Indicator</b>	<b>07/08</b>	<b>08/09</b>	<b>National average (08/09)</b>
NI8 Adult participation in sport and active recreation	21.9	23.6	21.95
NI9 Use of public libraries	N/A	50.3	48.5
NI10 Visits to museums or galleries	N/A	53.3	53.8
NI11 Engagement in the arts	N/A	50.1	45.2

They show that Cornwall performs better than the national average for all of these cultural indicators<sup>1</sup>. During the period 2005-2009 Cornwall saw a significant increase in participation in sport of 2.4% while many authorities experienced no change. These measures are not directly comparable with each other because the definitions of participation and engagement vary. For example, NI8 measures participation in sport for three times a week for at least 30 minutes and NI9 records one visit over the last 12 months.<sup>2</sup>

## **Introduction**

This report has been produced for Cornwall Cultural Partnership as part of the development of its new cultural strategy. It has been prepared by Cornwall Council's Community Intelligence team to evidence the role that culture plays in Cornwall and understand more about its contribution to wider social benefits.

It draws on local and national research to understand more about the cultural sector and how Cornwall Council and its partners can improve and support cultural offering in Cornwall. Consultation has been included from the 2008 Place Survey which provides insight into residents' perceptions of culture and their communities. Evidence has been included about wider social issues to demonstrate how a cultural strategy can contribute to the Council and its partners' priorities.

This report has been structured around four themes; people, place, the cultural sector and celebrating Cornwall. These broad themes cover a range of issues that are cross-cutting for services provided by the Council and partners. Each section includes evidence that aligns to the priorities of the Cornwall Cultural Partnership and Cornwall Strategic Partnership.

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<sup>1</sup> Data was collected for these indicators through the Active People Survey which was commissioned by Sport England and was conducted through telephone interviews.

<sup>2</sup> See also page 10 for information about NI6 regular participation in volunteering.

## People

Alignment to key priorities:

- Community – to increase the quality of cultural offer available to the local population which builds Cornwall’s reputation as a beacon of cultural excellence which ensures people can enjoy and benefit from cultural activity and which builds links between the cultural sector and new audiences (Cornwall Cultural Partnership priority).
- Healthy lifestyles and reduced risks to health and wellbeing (Cornwall Strategic Partnership priority)

This chapter focuses on the benefits of cultural activity for people that live work and visit Cornwall. This includes the physical and psychological benefits of sport and physical exercise as well as the wider social benefits of participation in cultural activity for adults and children. Evidence is included from the 2008 Place Survey to understand more about residents’ views of culture in Cornwall and what needs improving.

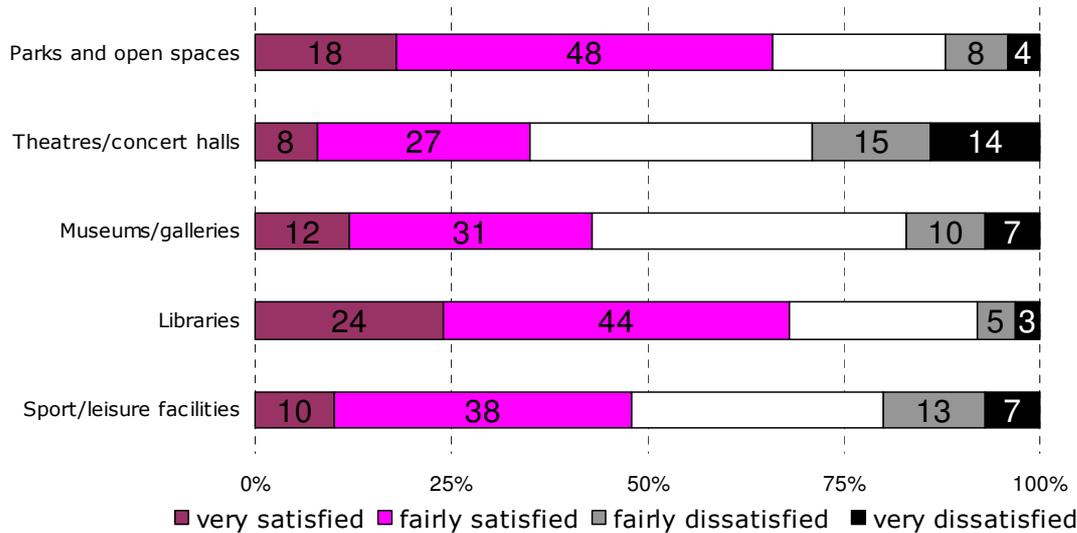
### **Participation and satisfaction with cultural activities**

The 2008 Place Survey revealed that in terms of cultural and recreation services, satisfaction is greatest in Cornwall with libraries at 68% and parks and open spaces at 66%. Just under half (48%) of residents were satisfied with sport and leisure facilities while 44% were satisfied with museums/galleries and 36% with theatres/concert halls.

Although museums/galleries in Cornwall appear to have improved on previous surveys, satisfaction with theatres/concert halls is below the national averages.

Interestingly, satisfaction with parks and open spaces, theatres/ concert halls, museums/ galleries, libraries and sport/leisure facilities is higher among respondents that have used these services.

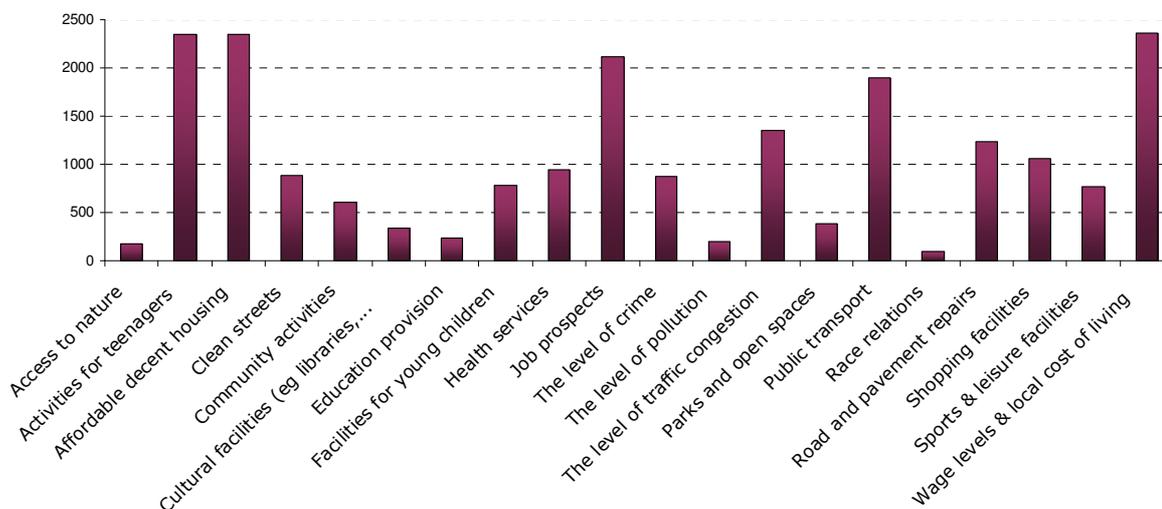
**How satisfied or dissatisfied are you with each of the following services provided or supported by the Councils of Cornwall?**



National research from the Department for Culture Media and Sport shows that lower rates of participation in cultural activities and events are consistently found with people from different groups. For example, 47% of adults from black and minority ethnic (BME) backgrounds, 58% of adults with a limiting illness and 57% of adults from lower socio-economic groups visited one type of designated historic environment site in the last 12 months compared to the national average of 70% (A better place to be).

The Place Survey also helps us to understand what is important to the people of Cornwall and what they feel most needs improving. While cultural facilities ranks relatively low in terms of needing improvement and making somewhere a good place to live, activities for teenagers ranks highly. Significantly, the survey shows that residents feel that activities for teenagers are as much of a priority for needing improvement as affordable housing.

### What most needs improving in your local area?



The 2007 Quality of Life survey for Cornwall revealed that photography is the most popular creative and cultural activity with 38% of respondents participating in this within the last 12 months. 31% had participated in art, craft and design and 25% had participated in activities linked to web sites and blogging. 68% of respondents had attended at least one festival or feast day in the previous 12 months. Of the respondents 62% had attended at least one music event and 62% had attended an agricultural or country show. The least popular cultural event, in terms of the percentage of respondents who had attended at least one event is literary events.

### Community cohesion

Culture and sport are powerful tools for building community cohesion<sup>3</sup>. Activities like football, music, dance, local history and filmmaking offer natural opportunities for people to come together and participate in community life. They break down barriers between diverse groups and can help create a sense of local pride and belonging (Tessa Jowell, Secretary of State for Culture, Media and Sport).

Evidence shows that those participating in cultural activities are 20% more likely to know many people in their neighbourhood and around 60% more likely to believe that many of their neighbours can be trusted. Importantly these figures hold for those from lower socio-economic groups (A better place to be).

Over four fifths (84%) of respondents to the Place Survey were satisfied with their local area as a place to live. Dissatisfaction with the local area is higher among the 18-24 age group and in the community network areas of Newquay, St Austell and Launceston. In addition almost half of residents

<sup>3</sup> Cohesive communities are ones where there are positive relations between people from different backgrounds and where everyone has similar life opportunities.

(48%) surveyed said their local area is a place where people from different backgrounds get on well together which is higher than the national average.

The last Census showed that across Cornwall about 1% of the population, in 2001, described themselves as being of Mixed, Asian/Asian British, Black/Black British, Chinese or other ethnic group, compared to just over 2% on average across the region and about 9% across England. This proportion is likely to have risen since 2001 with the number of migrant workers in the area, but little information is available on how many stay permanently. The 2001 Census allowed for the first time, people to identify themselves as Cornish. There were 33,900 returns from people who considered themselves to be Cornish, which is equivalent to 6.8% of the population. More recent surveys have shown higher percentages identifying as Cornish, which adds weight to the argument that the 2001 Census under-represented Cornish ethnicity. The next Census (2011) will provide more up-to-date figures and will help to understand this complex and deeply felt issue.

Cornwall has a strong sense of identity and is home to a diverse range of cultural activities and festivals. Cultural traditions such as Helston Flora Day and the Obby Oss festival in Padstow continue alongside revived or new events such as Golowan and the St Pirantide celebrations as well as more recent Respect, Pride, music and surfing events.

Cornwall has high levels of civic participation with almost a third of Place Survey respondents having been involved in regular volunteering in the last 12 months; this is almost 10% higher than the national average. This is recorded through National Indicator 6, participation in regular volunteering. Cornwall scores 32.3% for this indicator in comparison to a national average of 23.2%.

## **Engagement with children and young people**

For children and young people, cultural activities can be a key factor in their engagement and educational development. It can help to improve their confidence and divert them away from anti-social behaviour.

Play is an essential part of every child's life. Although Cornwall has open space, scenery, and accessible countryside we know that not all children who live here have equal opportunities for play. Play is part of the Every Child Matters agenda and supports positive outcomes in health, education, and social development. Our responsibility to support play goes beyond providing playground equipment and open spaces - though these things are important (Cornwall Play Strategy).

National evidence shows that there are increasing barriers to children's play, especially outdoors where it is beneficial. Barriers such as traffic, crime, the fear of crime, decreasing open spaces and negative attitudes towards children in the public realm all contribute to a reduction in play and children's freedom.

Consistent with national research, the consultation in the Cornwall Play Strategy highlighted that children in Cornwall want more places to go and things to do (positive activities) including open spaces to play, that are safe and accessible by all children and young people. The 2008 TellUs survey highlighted that in Cornwall 38% of children and young people thought the parks and play areas in their area were very or fairly good, compared with 44% nationally (Community Intelligence play, leisure and recreation focus paper).

Evidence suggests that participation in cultural activities has a beneficial effect on children and young people's education and achievement. The National Foundation for Educational Research conducted their Pupil Tracking Survey of 13,000 young people who participated in creative partnership activities. It found that young people who attended creative partnership activities outperformed those in the same schools who did not attend these events by a statistically significant amount at all three key stages (Briefing paper: culture, children and young people). Heritage can also play an important role in education and can help to introduce new audiences to culture. In 2006, 2.5 million schoolchildren visited historic sites in the UK (Cornwall heritage Strategy).

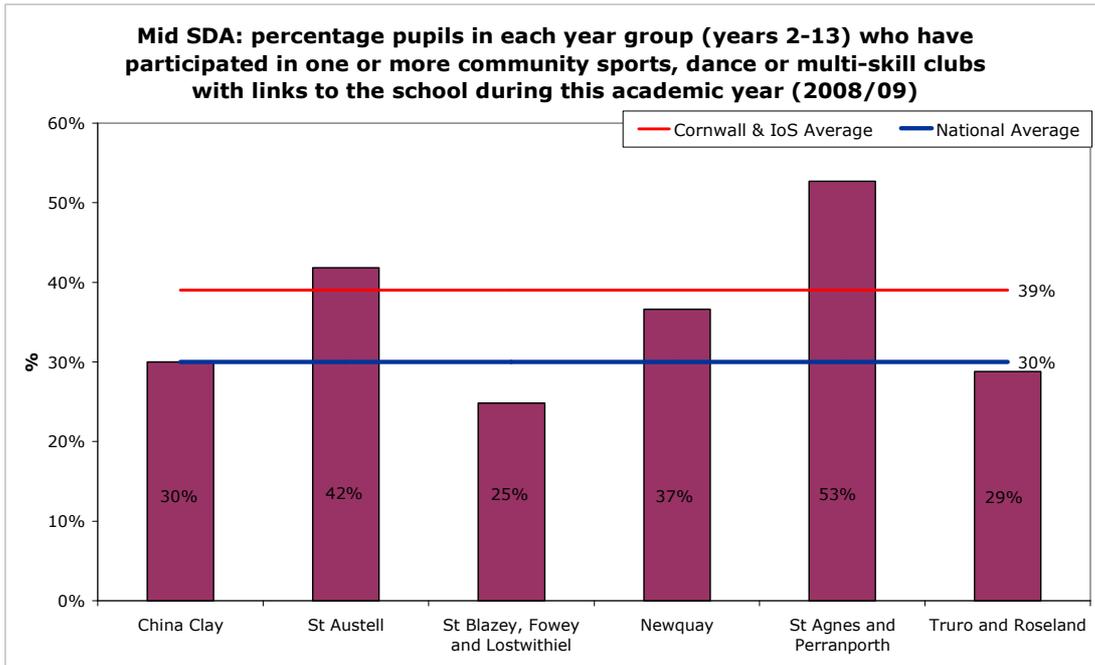
The national School Sport Survey measures the percentage of primary and secondary school pupils' participation in at least one community sports, dance or multi skills clubs in the academic year<sup>4</sup>. In comparison to the national average the majority of the community network areas have a higher proportion of pupils attending one or more community sports clubs. The Wadebridge and Padstow community network area has a significantly higher proportion of children participating in community activities than the Cornwall and national averages.

The St Blazey, Fowey and Lostwithiel, Truro and the Roseland and Hayle and St Ives community network areas have a lower than average proportion of children participating in a community sports club in Cornwall. The St Blazey, Fowey and Lostwithiel network is also one of the community network areas with the highest proportion of year 6 children classified as obese and overweight by the National Childhood Measurement Programme<sup>5</sup>.

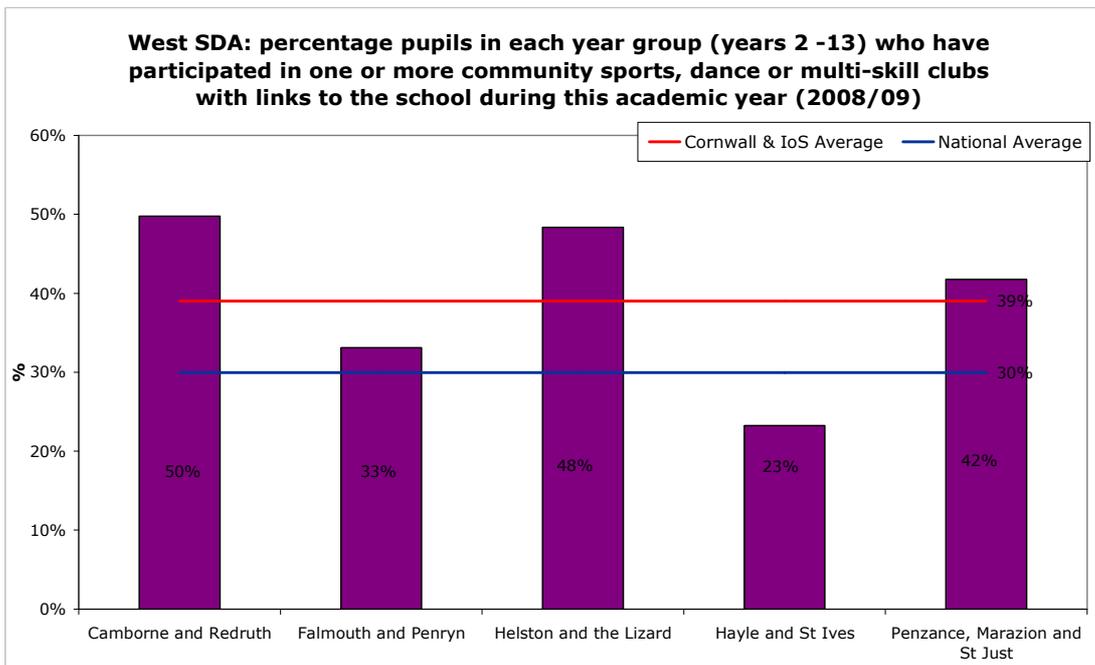
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<sup>4</sup> The charts provide an average score for each community network area based on the 2008/09 School Sports Survey. Please note the data is collected by school and is aggregated on the basis of school location rather than pupil residency.

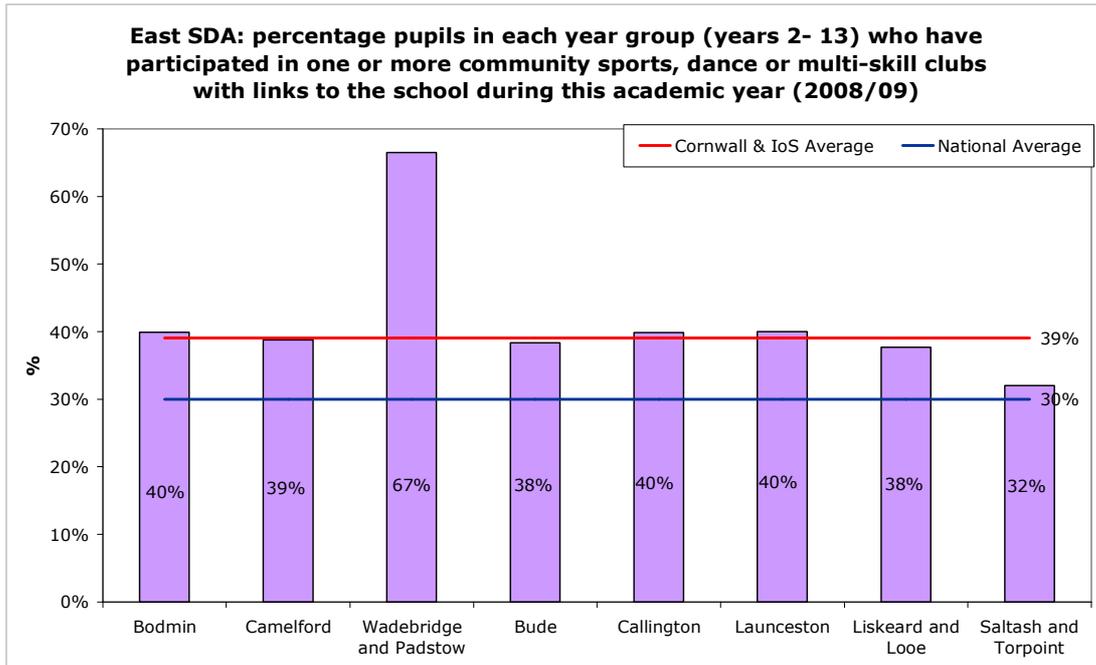
<sup>5</sup> Based on 2007/08 data, please refer to Kernow Matters 2009 for further explanation.



(Source: School Sport Survey, Kernow Matters 2009)



(Source: School Sport Survey, Kernow Matters 2009)



(Source: School Sport Survey, Kernow Matters 2009)

## Benefits for health and well-being

Culture plays an important role in improving health and wellbeing through cultural activities, environment and interaction. Cornwall's Health and Wellbeing Strategy highlights the physical benefits that cultural infrastructure and activities can have on an individual. It highlights that growing medical evidence shows that access to the natural environment improves health and wellbeing, prevents disease and helps people recover from illness. Physically active people also have a 20-30% reduced risk of premature death and up to 50% reduced risk of major chronic disease (Cornwall Health and Wellbeing Strategy).

Increasing levels of participation in physical activity and sport levels will help prevent and manage over 20 conditions and diseases including cancer, coronary heart disease, diabetes and obesity. It can also help to promote mental well being (NICE guidance: Promoting Physical Activity in the Workplace).

Evidence increasingly suggests that people with access to quality green space are healthier. Being outside can promote mental well-being, relieve stress, overcome isolation, improve social cohesion and alleviate physical problems so that fewer working days are lost to ill health (Future health: sustainable places for health and well being). It is therefore important that our environment is attractive, accessible and encourages physical activity such as walking and cycling which have a positive effect on our health and well being.

Hospital admissions for obesity in England have risen by 60% in the last year and by 360% compared to five years ago according to figures from the NHS Information Centre. The large increase in admissions for obesity

reflects the growing impact that obesity has on the health of our nation as well as the demands it is placing on limited NHS resources (South West public health and wellbeing bulletin November 2009).

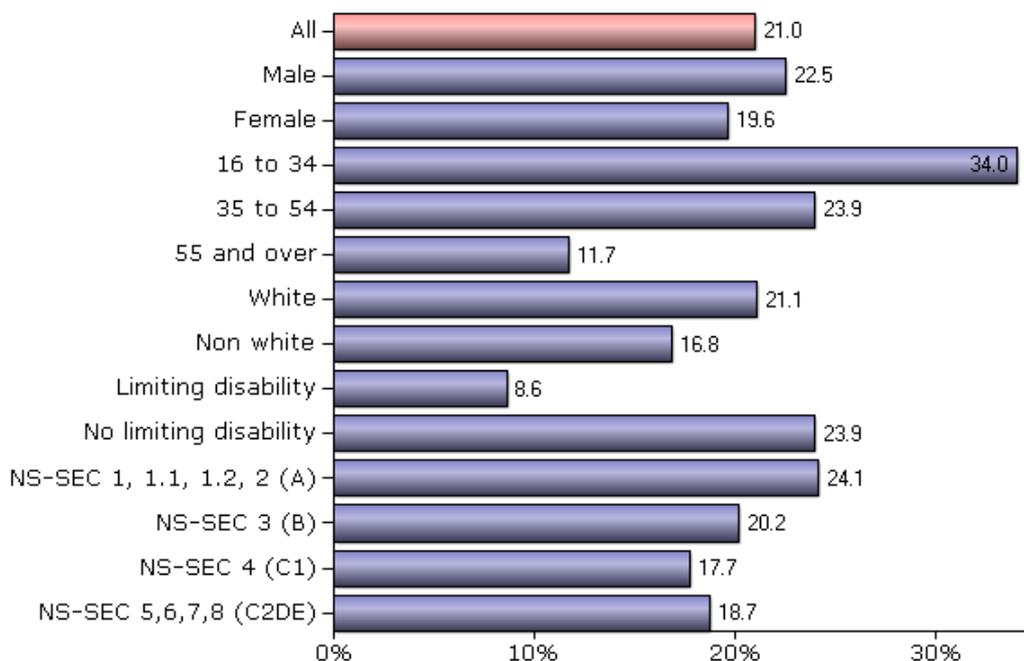
In 2007 it was thought that the costs of diseases related to being overweight and obese to the NHS in Cornwall and the Isles of Scilly were £145.1 million. It is predicted that the cost will rise to £161 million by 2015. This figure does not include the cost to the economy through reduced productivity or absence (Be Active, Be Healthy – A plan for getting the nation moving – HM Government).

## **Sport and recreation**

In Cornwall, 22.1 % of people aged 16 and over participate in moderate intensity sport and active recreation on three or more occasions per week which is marginally higher than the national average. However, a substantial proportion of the adult population of England have physical activity levels insufficient to improve their health. Evidence also shows that people with a disability, those on lower incomes, women and girls are less likely to participate in sport and physical activity (Community Intelligence sport and leisure focus paper).

The following chart illustrates the level of regular participation in sport (at least three times per week) in Cornwall and the Isles of Scilly. It provides insight into the most active and inactive groups in Cornwall and the level of their participation. This shows that those with a limiting disability and the over 55s have the lowest levels of participation and that women are more inactive than men.

## Participation in sport in Cornwall



(Source: Active People survey, Cornwall Sports Partnership Strategy 2007)

Cornwall has a long tradition of sports participation including gig racing and rugby through to the more recent growth in extreme sports. Cornwall also possesses distinctive physical features in its peninsular form, long indented coastline, granite moor lands and temperate climate. These characteristics have influenced sports development along with both the natural and socio-economic development (Cornwall Sports Partnership Strategy).

PE and sport in schools, both within and beyond the curriculum, can improve pupil concentration, commitment and self esteem, leading to higher attendance and better behaviour and attainment (Physical Education, School Sport and Club Links Strategy, Department for Education and Skills).

A recent audit of facilities in Cornwall looked at the level of need for community sport facilities. It found a general good spread of health and fitness provision with the exception of the Looe area. However, there were deficiencies in provision in the sparsely populated areas. The study also showed that participation is lower in the former district areas of Kerrier and Restormel than elsewhere in Cornwall (Facility need for community sport in Cornwall, August 2009).

The benefits of sport and physical activity are wider than just the health agenda. Opportunities are provided for people to meet and communicate with others, learn social skills, increase tolerance of others, increase qualifications, contribute to self esteem, reduce social exclusion and help support a sense of place (Realising the Potential of Cultural Services).

## Place

Alignment to key priorities:

- Internationalism – to create a two way exchange and trade links between Cornwall and other countries; (Cornwall Cultural Partnership priority)
- Commitment to challenge – to harness the best of Cornwall’s cultural assets, tacit knowledge and intellectual property to improve service delivery and produce innovative solutions to local issues; (Cornwall Cultural Partnership priority)
- Affordable housing (Cornwall Strategic Partnership priority); and
- Resilience (Cornwall Strategic Partnership priority).

The natural environment is a fundamental part of Cornwall’s cultural offering. This section looks at the strengths of Cornwall’s environment and its contribution to the tourism industry. It also explores the role that transport plays in cultural participation and the evidence about travel in Cornwall.

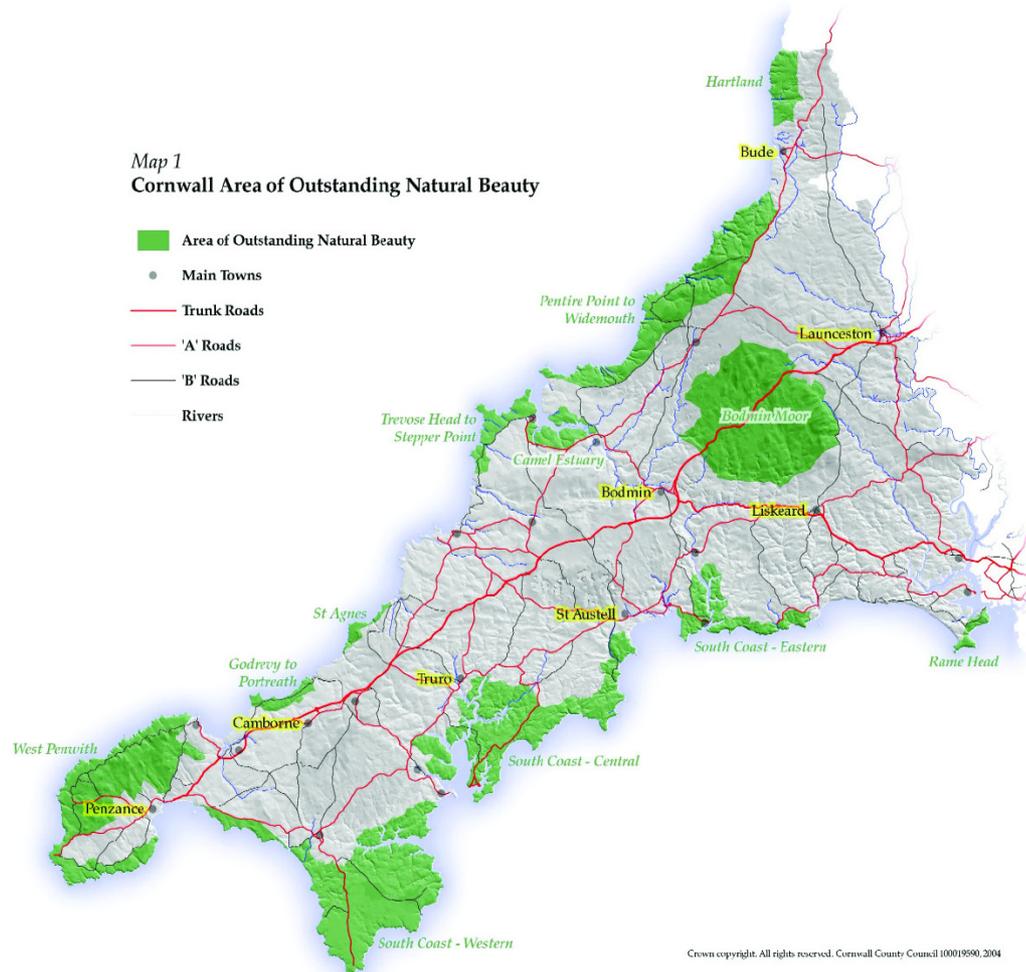
### Environment

Cornwall has a distinct culture which is enhanced and characterised by its unique environment. It has a working landscape and farming is its main land use with tourism as one of its main economic activities. Cornwall’s distinctive topography and outstanding natural and historic environment are particularly special to the people that live and visit. Cornwall’s Area of Outstanding Natural Beauty Management Plan recognises the significance of the landscape to the people of Cornwall and also to economic well being as a whole.

The designation as an Area of Outstanding Natural Beauty (AONB) is recognition of Cornwall’s distinctive landscape and the natural beauty of the environment and need to conserve it. There are 12 designated areas that fall within the AONB in Cornwall, these areas are diverse in character and cover 958 km<sup>2</sup>. Areas of Outstanding Natural Beauty are national assets that possess a distinct character and sense of place.

The landscapes of Cornwall’s AONB are an inspiration to artists and craftspeople, a reason why people live here and also come to visit. They are a key contributor to the economy of Cornwall and to the wellbeing of the population. Fishing and the marine industries contribute greatly to the character of the AONB and the landscape is the inspiration for many creative industries (Cornwall Area of Outstanding Natural Beauty Management Plan).

Figure 1: Cornwall Area of Outstanding Natural Beauty



Parts of Cornwall are also included in the Tamar Valley Area of Outstanding Natural Beauty<sup>6</sup>. This AONB was designated in 1995 and is located on the border of Devon and Cornwall. It encompasses the lower valleys of three west-country rivers - the Tamar, Tavy and Lynher, joining together at Plymouth Sound. The Lynher is an estuarine area extending west from Saltash and Torpoint to St Germans in south east Cornwall. The AONB includes approximately 1700 hectares of woodland, medieval bridges, farmland, an abundance of wildlife and around 600 holdings.

Tourism is one of the main drivers of Cornwall's economy and its long term future will depend on the appropriate management of the landscape and a sustainable approach to the management of the tourism industry itself (Cornwall Area of Outstanding Natural Beauty Management Plan).

The maritime environment provides opportunities for fisheries, tourism,

<sup>6</sup> <http://www.tamarvalley.org.uk>

recreation, renewable energy, and a whole range of support services such as marine technology development and innovative marine science (State of the Natural Environment in the South West).

The study 'Understanding the impact of cultural tourism in Cornwall' found that environment and cultural events are among the top reasons why people choose to visit. Arts/cultural events, the landscape and the beaches were amongst the top three reasons identified by respondents as to what attracts visitors to Cornwall. The most often cited reasons were:

- To attend arts or culture events (mentioned once by 80% of all respondents);
- Cornwall's landscape (71%);
- The beaches and seaside (69%);
- Cornwall's heritage (35%); and
- Cornwall's clean air (27%).

Cornwall's industrial landscape has also been recognised for its international significance through its designation as a World Heritage Site in 2006. This provides for the identification, protection and conservation of natural and cultural sites deemed of outstanding universal value. World Heritage status gives recognition to Cornwall's mining excellence as a world class cultural heritage site and recognises the importance of Cornish mining's historic landscapes, outstanding mine buildings and its important role in technological innovation and scientific research.

The World Heritage Site covers a wide variety of landscapes and destinations throughout Cornwall and west Devon. The Cornish Mining Attractions Marketing Association (CMAMA) works with the World Heritage Site to ensure a quality visitor experience for mining attractions that is consistent with the status. All CMAMA attractions have passed an assessment to ensure visitors have a good experience.

There are 165 Sites of Special Scientific Interest in Cornwall and the Isles of Scilly that have been recognised as nationally important wildlife and geological sites. These cover approximately 21,000 hectares, 12,000 hectares of which is within the Cornwall AONB (Cornwall Area of Outstanding Natural Beauty Management Plan).

The 2007 Quality of Life survey for Cornwall highlighted that increased traffic volumes, housing developments and a growing population were seen as the greatest threats to the natural environment in Cornwall, by 67.8%, 63.0% and 55.3% of respondents respectively. 41.8% of respondents felt that the Cornish environment was getting worse while only 12.7% felt it had improved.

## **Access to transport**

Transport is an important part of life, particularly in Cornwall. It helps people to get to work, access healthcare and education, shop, use leisure

facilities and socialise. It also plays a key part in engagement with cultural activities and events and can act as a barrier for some groups. Poor public transport options or access to a car can limit the range of cultural offerings for older people, those with a disability and younger people.

Cornwall has seen significant developments over the last few years including the Combined Universities in Cornwall, the Eden Project, Peninsula Medical School and other major town regeneration projects. Transport and access to services is fundamental to successful regeneration strategies and establishing basic quality of life requirements. The challenge in Cornwall lies in encouraging sustainable regeneration and development that promote economic, social and environmental objectives in Cornwall.

Nearly half of Cornwall's population live in communities of less than 3,000 people and a large proportion of residents are reliant on cars. In Cornwall 20.5% of the population don't have access to a car compared to 26.8% nationally (Community Intelligence access to transport focus paper).

Although traffic congestion is not comparable to other areas in the UK the increased demand on travel is affecting traffic levels, particularly in the main towns. During the summer months, and at other times of year, Cornwall witnesses an influx of visitors which adds to the demand on its transport and relatively modest standard of infrastructure. The development of Newquay Airport has changed the way some visitors travel to Cornwall but analysis of visitor travel methods shows that the car is still the most popular form of transport. Transport is an important aspect of participation in cultural activity that needs to be carefully considered when developing cultural activities and events.

## Cultural sector

Alignment to key priorities:

- Strong sector – to grow sustainable, high value jobs (Cornwall Cultural Partnership priority)
- Income, skills and poverty (Cornwall Strategic Partnership priority)

This section looks at the cultural sector in Cornwall as well as cultural tourism and its contribution to the local economy. It also includes evidence about skills and job opportunities within this sector. Analysis has also been included about the creative industries to show Cornwall's position in comparison to other areas.

### Cultural tourism

Cultural events and festivals are a growing market in Cornwall and the number of events has increased significantly over the last five years. Tourism in Cornwall remains concentrated during the peak summer months. Cultural events and festivals, which in themselves are often strong motivators for visitors, could make a significant contribution to encouraging more people to visit during off-peak and shoulder months. Culture also has the potential to contribute significantly to the sustainable growth of the tourism industry in Cornwall. There is strong evidence that it is a growth market and cultural tourists spend more and stay longer. However, there is a need to manage this growth effectively in terms of infrastructure and facilities (Understanding the impact of cultural tourism in Cornwall).

### Contribution of the cultural sector to the economy

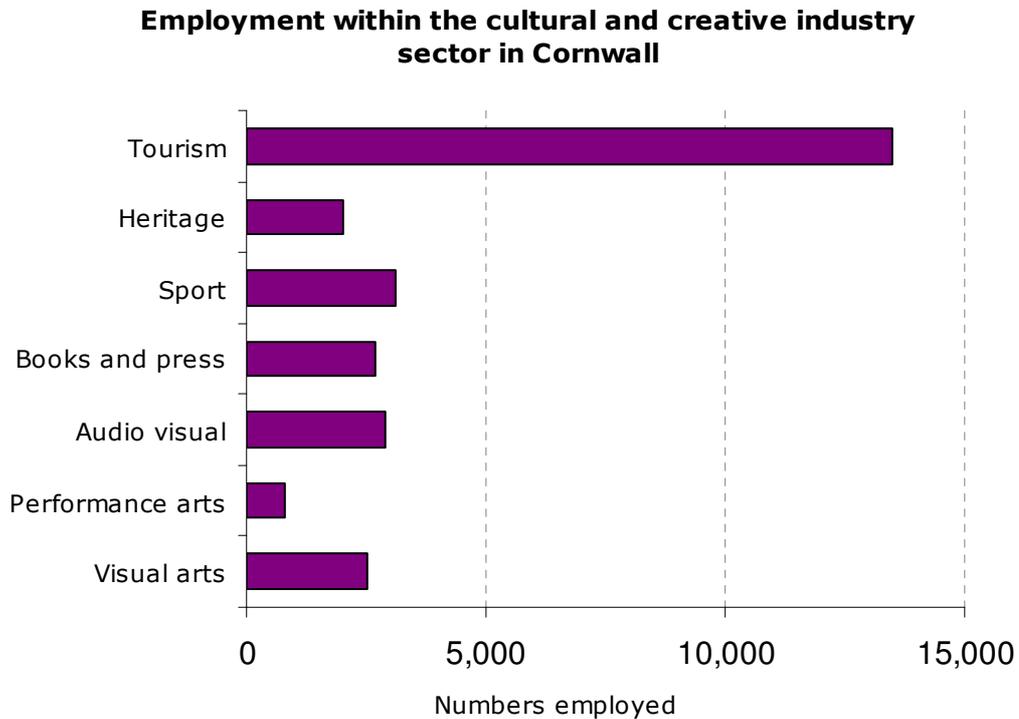
Culture is a key contributor to Cornwall's economy. Recreation and culture remain the second highest category of average weekly household spend after transport (State of the South West, South West Observatory, 2009).

The economic contribution of cultural activity can be measured in terms of business turnover, employment rates and expenditure. In 2006, there were 25,900 businesses in the cultural sector in the South West, with a turnover of £10.6 billion. These businesses employ 183,475 people (ONS, June 2007).

Evidence also shows that jobs in the creative industries have been growing at up to twice the rate of the rest of the economy and one in 20 people now have creative occupations (A better place to be).

Figures released by the Office for National Statistics demonstrate the role that cultural and creative industries has on employment in Cornwall. The

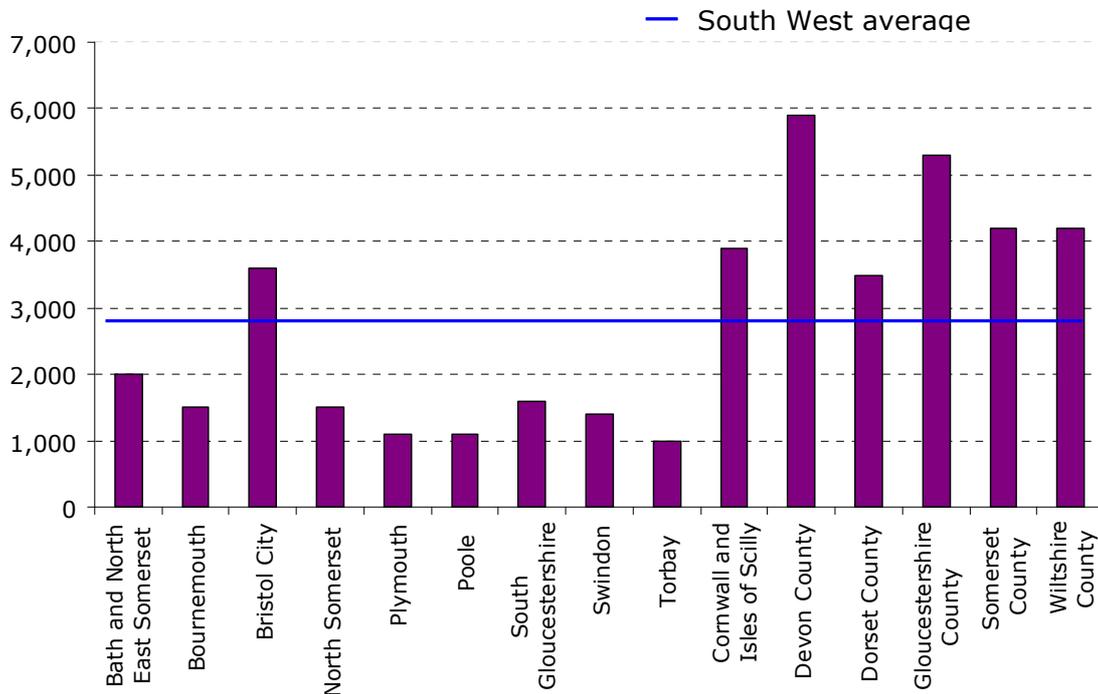
information shows that there are approximately 27,300 people employed in this sector in Cornwall and the Isles of Scilly. This is the third highest in the South West after Devon and Gloucester. Analysis of the sub sectors shows that tourism is the greatest employer with 13,500 employees followed by sport at 3,100 and audio visual at 2,900.



(Source: April 2009, figures produced by the Office for National Statistics regional presence and based on Inter-Departmental Business Register data. These counts are indicative, using SIC codes taken from the DCMS's Regional Cultural Data Framework 2002)

Analysis of the number of creative industry units shows that Cornwall has a greater number than other local authorities in the South West at 3,900. This is also greater than the total number in the Bristol and Bath & North East Somerset local authorities. However, further analysis shows that Cornwall has a lower percentage of creative industry units at 15% of its total in comparison to 23% in Bath and North East Somerset and 21% in Bournemouth.

### Cultural and creative industry units by local authority



(Source: April 2009, figures produced by the Office for National Statistics regional presence and based on Inter-Departmental Business Register data. These counts are indicative, using SIC codes taken from the DCMS's Regional Cultural Data Framework (2002). Values have been rounded to the nearest 100)

### International markets

Tourism is one of the biggest contributors to Cornwall's economy and in 2007 the industry was estimated to be worth £1.6 billion with over 5.5 million visitors (South West Tourism).

Cultural events are a key driver in influencing people to visit Cornwall. Research into the impact of Cornwall's cultural activity revealed that 49% of those questioned stated that attending the cultural event was their primary reason for being in Cornwall. This is compelling evidence of the ability of cultural events to attract people into Cornwall who otherwise would not have come. Cultural events can also be a motivator for first time visitors and can act as a shop window for the area to encourage people to think about moving to live and work in Cornwall (Understanding the impact of cultural tourism in Cornwall).

Of the six cultural events surveyed in the study, 43% of all attendees were visitors and 7% were from overseas. The most common overseas places of residence mentioned included Germany, USA, Canada and Denmark.

A wide range of vibrant cultural events are perceived to be an important part of attracting students to study in Cornwall and in retaining young people. The range of cultural, sporting and other activities that students can participate in, along with the provision of world class education, are seen as key selling points for the Combined Universities in Cornwall (Understanding the impact of cultural tourism in Cornwall).

7% of visitors to the Eden Project are international and there is a 10% awareness of Eden in English speaking countries compared with 80% in the UK. The international visitors are very likely to have already visited the UK at least once before, prior to going to Cornwall. The main countries they come from are Germany, The USA, Australia and The Netherlands (Living Places, 2008). Eden is gearing up to celebrate its contribution of £1 billion to the Cornish economy from its opening in March 2001 to the end of 2009.

## **Jobs and skills**

There has been continued growth in employment across Cornwall since 2000 but these jobs have tended to be either in lower paid sectors, or lower paid than their UK equivalents, regardless of sector or business (Economic Evidence Review).

Cornwall's heritage sector is reasonably small and has a limited number of job opportunities. Approximately 50% of those working in the sector are educated to master's degree level or above. However, wage levels are typically low which is disproportionate to the qualifications and skills found in the sector. For many, entry into Cornwall's heritage sector is dependent on gaining extensive work experience, mostly unpaid (Cornwall Heritage Strategy).

Research undertaken on the economic importance of sports services and manufacturing in Cornwall and the Isles of Scilly revealed around 4,000 full-time equivalent jobs in the sports sector. This employment is split 50:50 between full time and part-time employment with most businesses reporting growth. Sport accounts for a larger share (2%) of the total economic activity in Cornwall and the Isles of Scilly than the national average (1.5%). There is however a lack of recognition of the industry as a significant employer (Cornwall Sports Partnership Strategy).

The economic impact of sport is growing and will expand even more rapidly if the current proposals to significantly raise levels of active participation are delivered, including levels of employment and consumer expenditure on sports related goods and services (Sport playing its part, Sport England).

The World Heritage Site economic impact assessment in 2003 identified 47 mining conservation businesses in Cornwall and West Devon with an estimated 119.6 FTE jobs directly supported through conservation and mining heritage assets.

The Eden Project is one of Cornwall's main cultural attractions and is of national significance. It employs nearly 500 staff and estimates that a further 3,000 jobs have been sustained locally due to its continuing success. Eden also provides wider benefits for its 2,500 local suppliers and a range of other businesses such as hotels, restaurants, bed and breakfasts, pubs and taxis (Living Places, 2008).

## Celebrating Cornwall

Alignment to key priorities:

- Cornish roots – to sustain, build and celebrate Cornwall’s distinctive cultural offering; (Cornwall Cultural Partnership priority)

Cornwall has a strong sense of identity, heritage and cultural offering. This section explores ‘Cornish roots’ in terms of our language, sense of identity and heritage.

### Identity

In Cornwall, Cornish ethnicity is recognised but estimates of numbers vary. The 2001 Census forms enabled people to identify themselves as Cornish under the White: British category by writing the word Cornish. Forms returned for those who identified themselves as Cornish produced a figure of 33,900 which is equal to 6.8% of the population. Percentages ranged from 5.6% in Caradon to 9.2% in Penwith.

Other surveys have produced higher figures. The 2007 Cornwall Quality of Life survey produced a figure of 25.9% of the population. Percentages varied across Cornwall from 39.5% in Penzance to 20.9% in Liskeard. Despite an unclear picture the surveys reveal that there is a strong sense of Cornish identity within Cornwall.

### Language

The Cornish language is a critical aspect of Cornwall’s identity and cultural heritage.

Over the past decade there has been a noticeable surge in the use of the language by businesses, the voluntary sector and ordinary people (Cornish Language Strategy). In 2007 the Quality of Life Survey showed that over 30% of respondents are positively in favour of increasing usage of Cornish in public life, with the most support being from the younger age groups.

A Government Office South West report in 2000 estimated that there were approximately 300 effective Cornish speakers and 750 people learning the language. Since that time the numbers have increased with more recent estimates placing the number at 2,000 Cornish users.

A survey of Cornish language users by the Cornish Language Partnership found that almost two thirds of respondents were aged 45-74 and more than 60% were qualified to at least degree level. Interestingly, 30% resided

outside Cornwall and 35% did not consider themselves to be Cornish. The survey also highlights the importance of the language for users' cultural identity and sense of ancestry (Cornish Language Survey).

The Cornish Language Strategy emphasises the importance of the language and the wider benefits that can be attributed to it. The language can be seen as a means of helping to build stronger communities and encouraging a sense of place and identity. It can also help people gain new skills and develop an increased sense of ownership among young people. The Cornish Studies Library receives approximately 4,500 visits to use the library collection each year.

Other language communities have proved that the reinforcement of identity associated with language can be positive in the commercial world in marketing products and Cornwall itself, particularly through cultural tourism initiatives and in terms of regional development and cultural heritage (Cabinet report on Cornish Language Policy).

In 2003 Cornish was recognised by the Government under the European Charter for Regional or Minority Languages. This seeks to protect and promote historical regional languages and the contribution they make to Europe's cultural diversity.

In November 2009 Cornwall Council adopted its Cornish language policy. This promotes the inclusion of Cornish to be considered for all council publications and signs and used as appropriate; this ensures that new road signs will feature Cornish where possible.

## **Cultural assets**

Cornwall has a distinctive array of cultural assets that are of national importance and interest. Assets such as the Tate Gallery in St Ives which is home to a world class gallery space and collection and education facilities that maximise the benefit of the Tate brand and profile in Cornwall. Others such as Porthmeor Studios also in St Ives contribute to preserving Cornwall's creative heritage and art history. The studios, which are the oldest artists' studios in the country, have secured Art Lottery funding to help retain this asset for future generations.

The merger of University College Falmouth and Dartington College of Arts has also led to the creation of a unique education institution in Cornwall which specialises in art, design, media, theatre, choreography and music. This diverse offering helps to attract students from Cornwall the UK and internationally. The creation of the National Maritime Museum in 1992 has also helped to put Cornwall's maritime history and connections firmly on the map. The museum, which is based in Falmouth, aims to promote the maritime heritage of Cornwall through conservation, education, research and entertainment while supporting the town as a tourist destination.

## Heritage

Heritage plays an important role in shaping the identity of a place and increasing residents' sense of belonging. National research from the Heritage Lottery Fund has found that nearly three quarters of local residents believe that investment in the historic environment makes local areas more attractive and 61% say it makes an area a better place to live (Cornwall Heritage Strategy).

Cornwall's heritage has many recognised and distinctive aspects from the traditional Cornish symbols such as the St Piran's flag to the range of unique literature, folklore and legend and Cornish dialect stories. Cornwall's distinctive cultural offering encompasses Cornish music and Celtic institutions such as the Gorseth along with the inheritance of engineering, invention and technology that originated in Cornwall's mining industry.

It was only following the recognition of Cornwall's distinctiveness, including distinct and historic factors reflecting a Celtic background (ONS) that Cornwall was classified as a single European NUTS-2 region, thus enabling the successful bid for the Objective One and then Convergence investment programmes.

The heritage sector includes conservation, archives, museums, galleries, historic natural and marine landscapes and archaeology. Its unique role ensures heritage is a key driver for economic regeneration. In 2008 this sector contributed £1.01 billion to the UK economy which is an increase from £952 million in 2006.

Heritage plays a key part in economic regeneration; it helps us to understand how society has evolved and contributes to shaping our future. Over recent years, Cornwall has benefited from significant investment from Objective One, the South West Regional Development Agency, English Heritage and the Heritage Lottery Fund. In Cornwall, £60 million has been invested in 43 heritage projects across Cornwall. This has helped to improve 260 buildings, complete 33 public realm schemes, improve 35,000 square meters of floor space and create 292 jobs as a direct result of these projects (Heritage strategic core data). For every £1 invested by local authorities £50 has been secured from other sources.

Cornwall has twice the number of listed buildings (12,398) of any local planning authority in England and over three times the number of all but four of the 349 Councils in England. Cornwall has the largest number of statutorily protected heritage assets in a unitary council area (Heritage strategic core data). Sustainability is an underlying theme and protecting Cornwall's heritage assets from environmental threats and destruction is fundamental to its future.

Designated heritage sites in Cornwall:

- 1,872 scheduled monuments
- 145 conservation areas

- 36 registered parks and gardens
- 2 registered battlefields
- 12 designated wrecks
- 2 designated war grave wrecks
- Cornish mining World Heritage Site which covers 5% of Cornwall

The South West has a significant proportion of the nation's historic assets and many of these are considered at risk. The Heritage at Risk Register from English Heritage provides information about the sustainability and condition of these assets. It shows that approximately 4,000 of the regions monuments and a significant proportion of wrecks are at high or medium risk.

The South West also has a significant percentage of listed buildings. The proportion of all planning applications for listed building consent is 9% in the South West compared to 5.7% nationally.

The Department for Culture, Media and Sport's Taking Part survey found that participation rates in the South West's historic environment remain above the national average (Heritage Counts).

## **Museums and archives**

The key role of museums as resources for education and leisure contributes to contemporary culture. Their economic impact through the attraction and retention of relatively high spend visitors is well documented. A local community-focused museum can be highly influential in creating a sense of community, encouraging social cohesion and a beneficial sense of pride and commitment. Cornwall has 33 museums, excluding those which are privately owned. Of the 33 museums, 23 are run by registered charities (of which 7 are managed by the National Trust).

Cornwall Record Office attracts between 4,000-4,500 visits a year and, in total, over 12,000 original documents are produced from the strong rooms for people to view, use and photograph. The service reaches a further 1,500 adults and children through its learning programme's activities and events across Cornwall. Last year it received 9,000 contacts by email, post and telephone from people making enquiries and bookings to use the office. Its website receives, on average, 11,000 hits a month plus an unrecorded number of hits to its on-line catalogue.

## **European Region of Culture campaign**

Cornwall's European Regions of Culture (EROC) campaign was set up to investigate the possibility of creating a parallel scheme to the European Capital of Culture. The campaign sought to improve the profile and investment of the cultural sector in Cornwall. The campaign worked with

other rural regions in Europe to connect and celebrate European rural culture. This programme includes developing an excellent cultural product, growing internationalism and piloting cultural initiatives that have a demonstrable positive effect on social, economic and environmental situations experienced by Cornish communities.

Culture plays an important part in the economy and the investment in an area. During Liverpool's year as the 2008 European Capital of Culture it experienced an £800 million boost to the economy and saw 3.5 million first time visitors.

## Conclusions

Cultural activity provides a range of social benefits from education to integration and this helps to create cohesive communities<sup>7</sup>. These benefits can help to reduce the risk of disease and even reduce the risk of premature death. Cultural provision has a key role to play in building sustainable communities, reducing inequalities and improving quality of life for all groups.

The population of Cornwall is growing and changing. Over the next 20 years the population is expected to grow by 27%. There are high numbers of older people and recent migration trends have seen fewer young people leaving Cornwall. Cultural activity can improve the health and well being of all population groups while helping them to become more cohesive.

Local authorities and their partners are fundamental in providing cultural infrastructure and activities for their communities. Museums, libraries, archives, culture-led regeneration and spatial planning are all important aspects of cultural offering provided by local authorities.

Cornwall has a strong sense of identity and a distinct culture which is enhanced and characterised by its natural environment. This has been recognised for its national and international significance through its designation as a World Heritage Site and an Area of Outstanding Natural Beauty. Cornwall's landscapes are an inspiration to artists and craftspeople and a reason why people come to live and visit. The environment is also a key contributor to the local economy and the quality of life for its residents and visitors.

Evidence shows that access to the natural environment and green space is beneficial for health and mental well-being. However, we know that a substantial proportion of the adult population have physical activity levels insufficient to improve their health. Children and young people in Cornwall have higher than average levels of involvement in community sports, dance or multi-skilled clubs but there is a significant variation in levels between community network areas.

The 2008 Place Survey revealed that residents rank activities for teenagers highly in terms of what most needs improving in their local area. Significantly, this is considered as much of a priority for needing improvement as affordable housing. Consultation also shows that children and young people want more spaces to play and things to do.

In addition to health and social benefits cultural activity also brings economic benefits. Culture is a key contributor to Cornwall's economy and helps to attract people to live, work and visit. The sector plays an important role in Cornwall's attraction and offering for its residents and visitors alike.

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<sup>7</sup> Cohesive communities are those where there are positive relations between people from different backgrounds and where everyone has similar life opportunities.

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